**Full Name:**

**DOB:**

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| --- | --- | --- | --- |
| Savings Item | Evidence Needed | Types of Evidence Accepted | Attached |
| Bank Account | Yes | 6 months’ worth of bank statements. |[ ]
| Building Society Account | Yes | 6 months’ worth of bank statements. |[ ]
| Cash | No |  |[ ]
| Income Bond | Conditional | If this bond has life assurance, you will need to send in evidence of this. |[ ]
| Individual Savings Accounts (ISA) | Yes | Statement. |[ ]
| Investment Bond | Conditional | If this bond has life assurance, you will need to send in evidence of this. |[ ]
| National Savings Account | Yes | Statement. |[ ]
| Other Savings | No |  |[ ]
| Personal Injury Awards | No |  |[ ]
| Post Office Savings | Yes | Statement. |[ ]
| Premium Bonds | No |   |[ ]
| Shares | Yes |   |[ ]
| Benefits Item | **Evidence Needed** | **Types of Evidence Accepted** |  |
| Attendance Allowance | Yes | Award letter or a bank statement. |[ ]
| Disability Living Allowance - Care | Yes | Award letter or a bank statement. |[ ]
| Disability Living Allowance - Mobility | Yes | Award letter or a bank statement. |[ ]
| Personal Independence Payment - Care  | Yes | Award letter or a bank statement. |[ ]
| Personal Independence Payment - Mobility | Yes | Award letter or a bank statement. |[ ]
| Employment Support Allowance | Yes | A decision letter from the DWP or a bank statement. You can find this figure on your bank statement with the reference ‘your national insurance number followed by DWP EESA’. |[ ]
| Income Support | Yes | Award letter or a bank statement. |[ ]
| Job Seekers Allowance | Yes | Award letter or a bank statement. |[ ]
| Universal Credit | Yes | Award letter with breakdown. |[ ]
| Carers Allowance | Yes | Award letter or a bank statement. |[ ]
| Incapacity Benefit | Yes | Award letter or a bank statement. |[ ]
| Industrial Injuries Disablement Benefit | Yes | Award letter or a bank statement. |[ ]
| Severe Disablement Allowance | Yes | Award letter or a bank statement. |[ ]
| Pension Credit - Guarantee Credit | Yes | Award letter or a bank statement. |[ ]
| Pension Credit - Savings Credit | Yes | Award letter or a bank statement. |[ ]
| Working Tax Credit | Yes | Award letter or a bank statement. |[ ]
| Child Tax Credit | Yes | Award letter or a bank statement. |[ ]
| Constant Attendance Allowance | Yes | Award letter or a bank statement. |[ ]
| Child Benefit | Yes | Award letter or a bank statement. |[ ]
| Housing Benefit | Yes | Award letter or a bank statement. |[ ]
| Pension Items | **Evidence Needed** | **Types of Evidence Accepted** |  |
| Occupational Pension | Yes | Salary/Pay Slip, bank statement. |[ ]
| State Retirement Pension | Yes | Bank statement. |[ ]
| War Disablement Pension | Yes | A letter or a bank statement. |[ ]
| War Widows Pension | Yes | A letter or a bank statement. |[ ]
| Other Income Items | **Evidence Needed** | **Types of Evidence Accepted** |[ ]
| Annuity | No |   |[ ]
| Other Income | Yes | Other income can include rental income, maintenance payments, spousal support. Bank statements, rental agreements, copy of agreement. |[ ]
| Salary/Earnings | Yes | Payslip. |[ ]
| Trust Fund Income | Yes | Trust documentation. |[ ]
| Essential Expenditure Items | **Evidence Needed** | **Types of Evidence Accepted** |  |
| Funeral Plan Costs | Yes | Funeral Plan/Copy of the repayment plan. |[ ]
| Council Tax | Yes | Council Tax Bill. |[ ]
| Ground Rent | Yes | Copy of Rental Agreement. |[ ]
| Mortgage | Yes | Bank statement or Mortgage Statement. |[ ]
| Other Essential Expenditure | Yes | Bank statement or agreement. |[ ]
| Rent | Yes | Copy of Rental Agreement. |[ ]
| Service Charge | Yes | Annual Statement. |[ ]
| Statutory Debts | Yes | Court Order Papers. |[ ]
| Statutory Order | Yes | Court Order Papers. |[ ]

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| **If you are filling in this form on behalf of someone and you have Power of Attorney, Deputy or Appointee status, please add scanned photos or documents as evidence of this at the end of the form.** |[ ]

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| --- | --- |
| Enduring Power of Attorney | Copy of EPOA |
| Lasting Power of Attorney | Copy of LPOA |
| Deputyship/Receivership | Copy of orders |
| Power of Attorney Application | Copy of Courts acknowledgement with case reference |