

Online Financial Assessment – Financial Information Checklist

National Insurance Number: _____ Council Reference: _____

Documentation required	This applies to me	I have found this documentation
<u>Savings and Assets</u>		
Bank/building society statements		
Post office account statement		
Property you own (including any equity release scheme information if applicable)		
Stocks and shares		
Trust funds		
Annuities/Investments		
Information about any other income		
<u>Benefits</u>		
Pension statement (state retirement and/or private pension) from the Department for Work & Pensions (DWP)		
Disability Living Allowance/Personal Independence Payments award letter from the DWP		
Income Support/Employment Support information from the DWP		
Universal Credit Allowance journal		
Attendance Allowance award letter from the DWP		
Any other benefits you receive		
<u>Pensions</u>		
Occupational Pension details		
Private Pensions		
Service Pension		
War Widow/Widower Pension		
Any other pension information		
<u>Other Income</u>		
Any other income not included above		
Rental Income information		
<u>Expenditure Information</u>		
Council tax		
Rent payments, Housing Benefit award letters		
Mortgage payments		
Any service charge information		
Any amounts you pay towards a lifeline/pendant		
<u>Disability Expenditure</u>		
Expenditure related to a disability		
Notes		