**Non-residential Financial Assessment Form 4**

**Additional Expenses**

This form is to be used to inform Newham Council of your Household and expenditure details and details of any other property. It only needs to be completed if your indicative calculation shows that you have to pay a charge or if you answer yes to one of the following questions:

* I own more than one property or own a property which I do not currently live in
* I have dependent children who live with me
* I have a partner neither of us receive Income support, employment & support allowance or pension credit
* I have a partner and one or both of us receive carer's allowance
* I receive income from insurance policies/ annuities/ investment bonds
* I have business assets which I am currently disposing

You will continue to pay the indicative charge we calculated using your income and capital details until you have completed this form and we have undertaken a full financial assessment. If following this assessment your charge goes up, we will apply the increase two weeks after you are notified of the change. If the charge goes down, we will apply the change from the date of your indicative charge and refund you any money you have overpaid.

**Section 1 - Basic Information**

National Insurance Number:

Surname: First Name:

Address:

Date of Birth:

**Section 2 – About your Partner**

By partner - we mean your husband, wife or someone you live with as if you are married/civil partnership.

You do not have to provide details of your partner’s income or savings. We will calculate your charges based on your income, savings and expenditure only. However, if you do we will be able to do an assessment of what you would pay based on your combined income, savings and expenditure and compare the two calculations. You will pay the lesser of the two. We will also be unable to provide you with accurate benefit advice without details of your partner.

Surname: First Name:

Permanent Address (If different to you): Postcode:

Telephone (If different to you): Relationship to you:

**Section 3 - Children** (see note 2)

Do you have dependent children Yes / No

(Under 20 if still in full time education)?

If yes, please give dates of birth in the table below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Children** | | | |
|  | **1** | **2** | **3** | **4** |
| Date of Birth |  |  |  |  |

## Section 4 – Other Property details (note 3)

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Yes** | | **No** |
| Do you own any property, building or land other than where you live? |  | |  |
| **If you answered yes to the above, please answer the following questions** | | | |
| Property Address | |  | |
| What percentage of the property do you own? Either indicate 100% or, if joint ownership, let us know what percentage you own and give details of the other owners. | |  | |
| Please give details of anyone who is living in the property including their name(s) date(s) of birth and relationship to you. leave blank if the property is empty | |  | |
| Current Value of property? | |  | |
| Outstanding Mortgage/other secured loan | |  | |

**Section 5 - Current living situation**

|  |  |  |
| --- | --- | --- |
|  | Tick where appropriate | |
| Yes | No |
| Do you own your own home? |  |  |
| Do you pay rent? |  |  |
| Are you a council tenant/private/housing association tenant? |  |  |
| Are you a boarder/lodger? |  |  |
| Are you living with relatives? |  |  |
| Are you living in hospital? |  |  |

**Section 6 – Household Expenses**

Housing Cost

When working out the costs of any contributions towards the cost of care we can allow a certain amount for expenses. Please give details and show frequency of payment.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Income** | | **Amount £** | **Please state frequency** | **For Office Use only: verified by:** |
| Mortgage Payments | |  |  |  |
| Loans for repairs or improvements | |  |  |  |
| Rent (after any housing benefit) | |  |  |  |
| Council Tax (after any benefit) | |  |  |  |
| Service charges | |  |  |  |
| Ground rent | |  |  |  |
| Buildings Insurance | |  |  |  |
| Heating costs | Gas |  |  |  |
| Electric |  |  |  |

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**Section 7 - Disability Related Expenses**

The level of disability related disregard is dependent upon the level of Disability Living Allowance/ Attendance Allowance paid to you.

We allow everyone standard Disability Related Expense Allowance. Expenses that are covered are Special diet, Chiropody and Hairdressing.

The current Disability Related Expense is as follows,

* Aged between 18-59 and receiving Low DLA/PIP - £10.00
* Aged between 18-59 and receiving Mid DLA/PIP - £15.00
* Aged between 18-59 and receiving High DLA/PIP - £25.00

Over 60 and receiving Attendance Allowance

* Low AA - £15.00
* High AA - £25.00

The standard Disability Related Expense is updated annually.

If you feel that you have exceptional costs specific to your medical condition above these rates than you will need to fill in Non-residential Financial Assessment Form 5 - Disability Related Expenditure

**Section 8 - Additional Information**

Additional information about your income, expenses or circumstances can be written in the space below:

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**Section 9 - Data Protection Information**

The Data Controller is the London Borough of Newham and we are responsible for the collection and processing of your personal information. Processing includes the organisation, retrieval, consultation, use and deletion or destruction of information and its disclosure to other agencies.

The information you provide will be processed mainly in connection with the administration charges for Adult Social Care Services.

Your personal information may however, be processed by other Council services where appropriate to facilitate the provision of services in respect of any of the Council’s activities including (but not limited to) benefits, to verify data accuracy, housing, environmental health and care services.

There may be a need to share with external partners and organisations e.g. health and other local authorities or information may be used in the prevention and detection of fraud and crime.

A full list of what information we control and process and for what purposes is set out in the Council’s data protection notifications filed annually with the Information Commissioner.

All information collected will be processed and held securely under the principles of the Data Protection Act 1998.

For further information on data protection, the Council’s use of information sharing, please contact the Information Governance Team on 020 8430 3737 or information.governance@newham.gov.uk.

## Section 9 - Declaration

I certify that the information I have given is a full and true statement of my expenditure. I understand that I may be asked to provide further evidence of these details to the London Borough Newham. I understand that I may be liable to criminal prosecution if I have misrepresented my financial situation.

I will notify the London Borough Newham of changes in my expenses or income.

I have completed this form as a record of my finances, because I intend to take up a service provided by the London Borough Newham, I agree that, if assessed as liable to pay, I must make regular and prompt payments to the London Borough Newham. If my services are provided to me or a representative through a Direct Payment, I understand that any charges towards my care will be deducted from the payment.

Signed: Print Name:

Date

Please note that the client named at section 1 should sign the form unless someone has legal authority to act on their behalf *.*

Please return the form to;

**Financial Assessment And Charging Team**

**London Borough of Newham**

**1000 Dockside Road**

**London**

**E16 2QU**

**Explanatory Notes:**

**Note 1 - About your partner**

*Do I have to provide details of my partner’s income and savings?*

You do not have to provide details of your partner’s income or savings. We will calculate your charges based on your income, savings and expenditure only. However, if you provide details of your partners income and savings we will also do an assessment of what you would pay based on your combined income, savings and expenditure and compare the two calculations. You will pay the lesser of the two. We will also be unable to provide you with accurate benefit advice without details of your partner.

**Note 2** – Children’s details (Under 20 if still in full time education)

We disregard all working tax credit/child benefit you receive; only your income will be assessed towards making a contribution. We need to know about any dependable child you have this will help us check your benefit entitlement.

**Note 3 - Property details**

We will disregard the value of the property that you are living in when we calculate your charge. However the value of any property you own that you do not currently occupy will be included in the calculations. .

**Further information and advice**

Please do not hesitate to contact us if you have any queries on this matter.

If you would like further copies, a large-print copy or information about us and our services, please telephone or write to us at our address below.

Financial Assessment And Charging Team

London Borough of Newham

1000 Dockside Road

London

E16 2QU

Further information is available: 0203 373 1184