Financial information form

The information you provide in this form will help us manage any ILF Scotland funding you (the recipient) may be entitled to now or in the future.

# Contact us

If you need any help completing this form, please contact your ILF Scotland Specialist Caseworker:

* Telephone: 0300 200 2022
* Email: enquiries@ilf.scot
* Website: ilf.scot

Write to us at: Ground Floor, Denholm House, Almondvale Way, Livingston EH54 6GA

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# ILF Recipient details

ILF Scotland Ref: Click or tap here to enter text.

Last name of recipient: Click or tap here to enter text.

Title

(Mr, Mrs, Miss, Ms, Other) Click or tap here to enter text.

First names: Click or tap here to enter text.

# Part one – your representative

If you are the ILF recipient and are filling in this form yourself, go straight

to part two.

If you are the ILF recipient’s representative and are completing this form on their behalf, please tick one of the relevant boxes below. We will send all our letters to you. You must sign the declaration on page seven on behalf of the recipient.

Your name: Click or tap here to enter text.

Title

(Mr, Mrs, Miss, Ms, Other) Click or tap here to enter text.

Your relationship to the

ILF Scotland recipient: Click or tap here to enter text.

I have Power of Attorney: Yes [ ]  No [ ]

I am their:

* Guardian under a Guardianship

Order in Scotland; or Yes [ ]  No [ ]

* Controller under the Office of Care

and Protection in Northern Ireland Yes [ ]  No [ ]

I am their Benefits Appointee: Yes [ ]  No [ ]

Other Click or tap here to enter text.

Give your address, incl postcode:

Click or tap here to enter text.

Home telephone number: Click or tap here to enter text.

Mobile number: Click or tap here to enter text.

Email address: Click or tap here to enter text.

# Part two – About your eligibility benefits

Please indicate the benefits you (the recipient) receive.

You can find this information on the letter sent to you by the Department for Work and Pensions every April telling you what benefits you receive.

Do you receive the Care Component of

Disability Living Allowance? Yes [ ]  No [ ]

If yes, which rate do you get? Lowest: [ ]

Middle: [ ]

Highest: [ ]

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Do you receive the Daily Living

Component of Personal Independence

Payment (PIP)? Yes [ ]  No [ ]

If yes, which rate do you get? Standard: [ ]

 Enhanced: [ ]

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Do you receive the Daily Living

part of Adult Disability Payment

Living Allowance? (Scotland Only) Yes [ ]  No [ ]

If yes, which rate do you get? Standard: [ ]

 Enhanced: [ ]

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Do you currently receive

Attendance Allowance? Yes [ ]  No [ ]

# Part three – About savings and capital

Do you have any money

in savings and/ or capital? Yes [ ]  No [ ]

If yes, how much do you have? Click or tap here to enter text.

This includes:

* One-off lump sum payments
* Investments (not including annuity payments which are regarded as income)
* Property/ land (apart from the home a recipient lives in)

If your savings and/ or capital exceed our maximum threshold, as outlined in our [Treatment of Capital policy](https://ilf.scot/publication/policy-39-treatment-of-capital/), our Assessor will discuss with you during your review the benefits you are in receipt of.

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Are you in receipt of a means-tested benefit? Yes [ ]  No [ ]

This includes Income Support, income-based Jobseekers’ Allowance,

Income-related Employment and Support Allowance, Pension Credit or Universal Credit.

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Do you have a Trust Fund? Yes [ ]  No [ ]

If yes, what is the fund type? Click or tap here to enter text.

How much is it worth? Click or tap here to enter text.

# Declaration and agreement

Please read through this section. Everyone must fill in and sign the

declaration on page seven.

In addition, if someone else claims Income Support, Jobseekers Allowance, Employment and Support Allowance, Pension Credit or Universal Credit on your behalf, they must also sign the agreement on page eight.

# How we collect and use information about you

When we ask you to give us information, we treat it in line with current Data Protection legislation.

Current Data Protection legislation says that information must:

* be collected and dealt with fairly
* only be used for the purpose it was collected for
* be accurate
* be up to date
* be kept only for as long as it is needed
* be kept safe

We will use the information you give on this form to help us manage any

funding you may be entitled to now or in the future.

We may also get information about you from other organisations or people, and we may be asked to share information. We would only do this if we are allowed to do so by law for example to:

* confirm that the information we have is accurate
* detect or prevent crime or
* prevent public funds being misused

# Organisations and people

# we may share information with

* Social Security Scotland
* the Department for Work and Pensions
* your Health and Social Care Partnership or Health and Social Care Trust (and any agents acting on their behalf)
* a Financial Management Organisation and/or Payroll Organisation acting for you
* the award manager, representative or appointee acting for you
* our solicitors and other professional advisors
* the police

By providing the information we ask for on this form, you give us permission to process information about you as described above.

We need to share some of the information you have given us on this form with the Department for Work and Pensions (DWP) or Social Security Scotland.

This is because we need to check that you still get the benefits you have told us about in this form.

We have to do this because we must take reasonable steps to make sure that we are giving the right amount of money to the right person.

# Your rights

If you (the recipient) or anyone else named on this form would like to know more about the personal data we hold about you, or if you

would like to know more about your rights under current Data Protection legislation, please contact our Data Protection Officer using the address at the end of this form or email dpo@ILF.scot .

More information can be found in our Privacy Policy on our website

<https://ilf.scot/privacy-notice/>

# Declaration

I confirm that, as far as I know, the information I have given in this form is true and complete. I understand that you will rely on this information to work out and process my payments. I understand that I will need to tell you if my circumstances change.

**We need this signature to confirm this information and to process your new award.**

Signature (yours or your

representative’s): Click or tap here to enter text.

Name: Click or tap here to enter text.

Date: Click or tap here to enter text.

**If you are signing on behalf of the ILF Scotland recipient, you must be acting as their representative. Please give us your details below.**

Name: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone number: Click or tap here to enter text.

# Agreement

If someone else claims Income Support, Jobseekers Allowance,

Employment and Support Allowance, Pension Credit or Universal Credit

for you they must sign and date this consent.

# Claimant’s Representative/Third Party Agreement

* As someone who has claimed benefits on behalf of the recipient, I understand that ILF Scotland may seek confirmation of this from the DWP (Department of Work and Pensions). I understand that the DWP may also process this information.
* I confirm that the information I have provided is accurate and correct. The DWP may also process this information and will tell you about any relevant changes that would affect the ILF Scotland recipient’s eligibility to continue receiving payments from ILF Scotland.
* I agree to notify ILF Scotland of any changes to benefits that I may apply for on behalf of the recipient.

Signature: Click or tap here to enter text.

Name: Click or tap here to enter text.

Date (DD/MM/YYYY): Click or tap here to enter text.

Relationship/role

to the recipient: Click or tap here to enter text.

Address: Click or tap here to enter text.

Phone number: Click or tap here to enter text.

**Address: ILF Scotland, Denholm House, Almondvale Business Park,**

**Almondvale Way, Livingston, EH54 6GA**

**Tel: 0300 200 2022 Email:** **enquiries@ilf.scot** **Web: www.ilf.scot**

ILF Scotland is a company limited by guarantee, registered in Scotland, Company Number: SC500075. Registered office: Denholm House, Almondvale Business Park, Almondvale Way, Livingston, EH54 6GA