

# FINANCIAL ASSESSMENT FORM



REF NO:

NAME:

ADDRESS:

FORM SUPPLIED BY:

Applicants who cannot afford their current accommodation costs can qualify for priority within the Durham Key Options Scheme.

To help us to carry out an assessment of your financial need, please answer all questions overleaf as fully as you can, giving details of your monthly income and expenditure, and provide written proof of your circumstances where requested.

If you need help in completing this form, or accessing the scheme, please contact us and tell us what we can do to help.

**In all cases we will require copies of your last two Bank/Building Society statements. Any original documentation that you provide will be returned to you.**

## FOR OFFICE USE ONLY

Name of Applicant

Reference No.

Date Received

Date Processed

Priority awarded

Yes  No  (If no please state reasons)

If No:

Signed Officer

Officer Name

Partner Organisation



## INCOME AND EXPENDITURE (FINANCIAL DETAILS)

Please provide evidence of all income and expenditure i.e. payslips, bank statements etc.

### INCOME

Type	Amount	Frequency (weekly, monthly etc)
Wages/Salary (main applicant)	£	
Wages/Salary (joint Applicant)	£	
Wages/Salary (other household members)	£	
Unemployment Benefit/Maternity Allowance	£	
Income Support/Pension Credit	£	
Child Tax Credit	£	
Child Benefit	£	
Working Tax Credit	£	
Retirement Pension	£	
State Pension	£	
Sickness Benefit (state type)	£	
Any other benefit (please state type)	£	
Child Maintenance	£	
Other	£	
<b>Weekly total</b>	£	

### EXPENDITURE

Type	Amount	Frequency (weekly, monthly etc)
Rent/Mortgage (after housing benefit)	£	
Second Mortgage/Secure Loan	£	
Rent/Mortgage Arrears	£	
Endowment/Mortgage Protection	£	
Council Tax (after benefit)	£	
Electricity	£	
Gas	£	
Other Fuel	£	
Water Charges	£	
House Insurance	£	
Life Insurance		
Housekeeping (inc food, toiletries etc)	£	
Telephone (inc mobile)	£	
Fines/Court Costs	£	
Child Maintenance	£	
Travelling Expenses (inc bus fares, car maintenance costs, insurance etc)	£	
Clothing	£	
T.V. Licence	£	
Hire Purchase	£	
School Meals	£	
Credit Cards	£	
Loans	£	
Other	£	
<b>Weekly total</b>	£	