



## Financial Statement

Name.....

Council Tax Reference number .....

Email address.....

Contact Telephone number .....

Date of Birth ..... N I Number .....

Dependant Children Under 16 ..... 16-18 .....

Other Dependants ..... Total no. of people in household .....

<b>Income £</b>	<b>Weekly</b>	<b>Monthly</b>	<b>Annual</b>
Wages/salary - Name and address of employer			
Wages/salary (Partner) - Name and address of employer			
Universal Credit			
JSA/JSA (c)			
ESA/ESA (c)			
Income support			
Child Benefit			
Child Tax Credits			
PIP/DLA Living Component			
PIP/DLA Mobility Component			
Attendance and/or carers allowance			
Money from other people including maintenance payments			
Other state Benefits i.e. state maternity pay/pensions			
Berevement Benefits			
Severe Disability allowance			
Student grant/loan			
Income from non-dependent contribution*			
<b>Total income £</b>			

\* This is any financial contribution someone who lives with you who is not a dependent child (under 18) or your partner, that is able to contribute to the household income.

**Please provide copies of your last 2 months payslips and bank statements showing your self employed income/wage or benefit payment.**

<b>Outgoings £</b>	<b>Weekly</b>	<b>Monthly</b>	<b>Annual</b>
Mortgage/Rent			
Second mortgage/secured loan (after Ground rent/service charges (after benefit)			
Buildings/contents insurance			
Life insurance/endowment			
Council tax			
Gas			
Electricity			
Water			
Food/housekeeping			
Car costs - Petrol			
- Insurance			
- Tax			
- MOT / Repairs			
Travel costs			
Internet/landline			
Mobile			
TV licence			
TV packages Sky, Virgin, BT			
Clothing			
Prescriptions/health costs			
maintenance payments			
Cigarettes/alcohol			
Other			
<b>Total outgoings £</b>			

<b>Priority debts £</b> (Type of debt)	Money owed	Payments negotiated to pay off debts (weekly/monthly)
Rent arrears		
Mortgage/2nd mortgage arrears		
Council tax arrears		
Gas arrears		
Electricity arrears		
Fines/Court orders		
Maintenance arrears		
Other		
<b>Total £</b>		

***Please note we may require you to provide evidence of your outgoings. Any supporting documentation requested must be dated within the last 3 months.***

<b>Non-priority debts £</b> (fill in name of creditor).	Money owed	Offer (weekly/monthly)

<b>Total £</b>
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**Bromsgrove District Council Debt** *(Please provide account numbers for all accounts with outstanding balances owed to the local authority)*

<b>Account Number or Invoice Number(s)</b>		
<b>Offer of payment £ (Amount, frequency, method)</b>		

**Vulnerabilities**

If you consider that you are a vulnerable household could you please provide details of who in your property is vulnerable, the nature of their vulnerability and how this affects the ability to pay or deal with this debt.

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<b>Signed</b>		
<b>Date</b>		
<b>Name/details/signature of person completing form other than customer</b>		

This completed form will be accepted by email to [benefits@bromsgrove.gov.uk](mailto:benefits@bromsgrove.gov.uk), by post or in person

**“Arrangements will not be considered unless the form is completed in full and returned with your last 2 months bank statements for all accounts held by yourself and your partner if you are a couple. Further documentary evidence may be required.”**

**Privacy Notice**

**Why do we collect this information?**

We need the personal information you supply on this form so that we can determine a suitable payment plan in respect of your Council Tax/ overpaid housing benefit .

The legal basis for this processing is that we are legally obliged to collect overpaid housing benefit and council tax.

What information is collected?

- Your name, address, phone number, signature
- Details of your financial circumstances

### **Who has access to the information?**

This information will be accessible to the staff working in the Revenues and Benefits teams at Bromsgrove District Council.

This information will not be shared with or sold to any other service or organisation unless we have a duty to do so under law.

### **Is the information sent outside the EEA?**

This information will not be transferred outside of the European Economic Area.

### **How long is the information kept?**

The information will be kept for seven years unless you have had a payment arrangement in place, in this instance we will keep your information for seven years from last date of payment.

### **Are any automated decisions made using this information?**

No decisions around this information are made by automated means.

### **Your rights**

Your statutory rights and other privacy information are available on the BDC website at:

**<https://www.bromsgrove.gov.uk/council/corporate/your-access-to-information/privacy-notice.aspx>**