



Date Issued: 18 December 2023

## Financial Statement

Name .....

Account Reference number .....

Contact Telephone number .....

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

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

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

Income £	Weekly	Monthly	Annual
Wages/salary – Name and address of employer			
Wages/salary ( Partner)– Name and address of employer			
IS/JSA/ESA/UC			
Child Benefit			
Child Tax Credit / Working Tax Credit			
DLA/PIP/AA/Carers			
Money from other people including maintenance payments			
Other State Benefits i.e.pensions			
Any other monies received			
<b>Total income £</b>			

***Please provide copies of your last 3 months payslips or bank statements showing your self employed income/wage or benefit payment.***

Outgoings £	Weekly	Monthly	Annual
Mortgage/Rent (after benefit)			
Second mortgage/secured loan (after benefit)			
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			
Total priority debts (see below)			
Total non-priority debts (see over)			
<b>Total outgoings £</b>			

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

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

I am offering to pay £..... per month/week (please delete as required)

Signed .....

Date .....

**Only reasonable offers will be accepted. By completing the information overleaf we will have a better understanding of your ability to pay. You may be required to provide evidence of your income or expenditure (eg bank statements and payslips).**

*(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 form will be accepted back in person, by post or electronically.

**Arrangements will not be considered unless the form is completed in full and returned with bank statements and or payslips. 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 is available on the RBC website at:

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