

EDF ENERGY TRUST

APPLICATION FOR FINANCIAL ASSISTANCE

BEFORE COMPLETING THE APPLICATION FORM, PLEASE CAREFULLY READ THE NOTES BELOW.

When you have completed the application form, you should detach these notes and keep them for your reference.

The EDF Energy Trust is a charitable Trust and is referred to as “the Trust” throughout this form.

WHO CAN APPLY FOR A GRANT?

- You can apply to the Trust if you are in need, hardship or other distress, and particularly if you are unable to meet or pay charges for your supply of domestic gas or electricity services.
- Other help may be available via grants to clear other priority household debts and to purchase essential household items. These grants are called Further Assistance Payments (FAPs). See section 14.
- Only the account holder (the person(s) named on the bill) can apply for help with gas, electricity, water or sewerage debts. If the account holder is unable to make the application for a grant, please explain why someone else is doing it on his or her behalf. The account holder **must** still sign the form.

HOW CAN THE TRUST HELP?

- The Trust **can** help clear domestic electricity, gas, water and sewerage debts.
- The Trust **can** help clear other priority household debts and purchase essential household items.
- The Trust **cannot** give loans or help with bills already paid or with items already bought.
- The Trust also **cannot** help with the following:
 - Fines for criminal offences
 - Educational or training needs
 - Debts to central or local government departments e.g. tax and national insurance
 - Deposits to secure accommodation
 - Medical equipment, aids and adaptations
 - Over payment of benefits
 - Business debts
 - Catalogues, credit cards, personal loans and other forms of non-secured lending
 - Holidays

Please note: The EDF Energy Trust is administered by Charis Grants Ltd (Charis) along with a number of other grant making funds. By signing this form you agree to your information being shared with these other funds for them to consider if you are eligible for their support. A full list of grant making funds administered by Charis can be viewed online at www.charisgrants.com

FILLING IN THE APPLICATION FORM

- Please complete **all** sections of the application form. If a section is not applicable, insert N/A.
- If you need help with your electricity, gas, water or sewerage debts, **you must provide:**
 - **A copy of your most recent bill, showing actual usage – NOT estimated.**
- If you need help with your electricity or gas debts, **you must also provide:**
 - **A meter reading taken on the date you submit your application (see section 6).**
Guidance on how to read your meter is given on the the back of your bill, or call your supplier.
- It is very important that you give as much information as possible about your circumstances.
You must send proof of your income. All evidence must be less than 3 months old.
- Please supply **copies** of **all** supporting documents as we do not return originals.
- If you need help with the form you should contact a local advice centre such as a Citizens Advice Bureau. They may be able to help you with the form and give help and advice on any money problems / debt issues that you have.
- **Please do not forget to sign the declaration in section 12 – if you do not sign it, we cannot assess your application.**
- If you are an 'Authorised Agency' applying on behalf of a client, remember to sign and date the declaration in section 12.

SENDING IN YOUR APPLICATION

- Once completed, the form should be returned to:
Freepost RLXG-RBYJ-USXE, EDF Energy Trust, PO Box 42, Peterborough, PE3 8XH

HOW WE DEAL WITH YOUR APPLICATION

- If we think that other organisations might be of interest to you, we may provide you with information about their work or share your details with them so that they can contact you about their services and/or products.
- Your information may also be used for research and analysis purposes by other organisations.
- You may receive letters, telephone calls or a home visit as part of our assessment process.
- If we are able to help with your electricity, gas, water or sewerage debts, a payment will be made directly to your supplier. We will write to you to tell you that this payment has been made.
- If you qualify for assistance from any other trust administered by Charis, your application will be considered automatically. We might need to ask you for more information. We will write to tell you if a payment has been made.
- If we are able to help with other priority debts and essential household items (FAPs), we will write to tell you.
- If we cannot help you with either kind of payment, we will write to tell you.
Please note that the Trust does not give particular reasons when a grant is not awarded.
- The Trust receives many applications so it may take several weeks to process yours.

APPLYING TO THE TRUST AGAIN

- If you receive an award, you cannot re-apply to the Trust for a period of **two years**.
- If you do not receive an award, you can re-apply after **six months**.

Please note that the decision of the Trust is final, and we do not operate an appeals procedure.

FOR OFFICE USE Date received:

Reference EDFET:

APPLICATION FOR ASSISTANCE

SECTION 1 PLEASE TELL US ABOUT YOURSELF AND YOUR FAMILY

Title (Mr / Mrs / Ms / Other) First Name Family Name

Address

Postcode Telephone Email

Date of birth Tick here if you own your own home or you rent it from a private landlord

Who shares your home with you? Tick all that apply:

Wife, husband, civil partner, partner Full name of wife, husband, civil partner, partner

Children and/or young people 19 years and under in full time education How many? Ages of children

Other adults over 16 years How many?

No one, I live alone

SECTION 2 WHAT WOULD YOU LIKE US TO HELP YOU WITH? (PLEASE REFER TO PAGE 1)

I am applying for help with my: electricity gas

I am applying for help with other essential household bills and costs (Further Assistance Payments (FAPs))

Including arrears of: water sewerage

Detail other help sought

Do you require information on energy/water efficiency from your supplier? Yes No

Telephone number for supplier to contact you

SECTION 3 HAVE YOU APPLIED TO THIS TRUST BEFORE?

Please tell us when you applied and from what address if this is different from your current address:

When Address Postcode

SECTION 4 HOW DID YOU HEAR ABOUT THE TRUST?

Website Newsletter Energy Supplier Local Advice Agency or other - please state:

Please tick here if you are receiving money advice.

SECTION 5 WHO SHOULD WE SPEAK TO REGARDING THIS APPLICATION?

You may be receiving help to complete your application. If you would prefer us to speak to someone else regarding your application - if more information is needed and with progress - please give their details below. This may be a friend, relative, or advice agency, e.g. Citizens Advice Bureau. **If this section is not completed we will write directly to the applicant.**

Their Name Mr/Mrs/Ms Their job title

Their organisation Authorised Agency Ref No

Their address

Postcode

Their telephone number Their Email

Tick here if you authorise the Trust to speak to anyone at this organisation regarding your application.

SECTION 6 IF YOU WANT HELP WITH YOUR ELECTRICITY AND GAS DEBTS OR WATER AND SEWERAGE DEBTS, PLEASE GIVE US DETAILS OF RELEVANT ACCOUNTS

Please note: Only complete rows in red type if applying for assistance from other grant making funds held by Charis.
View details online at www.charisgrants.com

	Name of supplier	Account Number	Present meter reading	Date of Meter Read
Electricity (current)				
Electricity (previous)				
Gas (current)				
Gas (previous)				
Water (current)				
Water (previous)				
Sewerage services (if billed separately)				

We cannot assess your application until a present meter reading is given, unless you have pre-payment meter.
If you have a pre-payment meter, please tick the appropriate box(es): gas electric

Are any of these charges from a previous address? (Please tick) Yes No Not sure

If yes or not sure, please give your previous address(es):

Address Postcode

If applying for help with debt from a previous account only, please also provide your current account details in the table above.

SECTION 7 PLEASE TELL US ABOUT YOUR HOUSEHOLD'S FINANCIAL SITUATION

The **only** alternative to completing section 7 is to submit the **income and expenditure budget sheet of the MAT/BBA Common Financial Statement Version 3 or 4 only**

HOUSEHOLD WEEKLY EXPENDITURE

Remember to include repayments from sections 8 and 9 in this column

HOUSEHOLD WEEKLY INCOME

Proof confirming income must be provided. See section 13.

Your take-home pay	£
Partner's take-home pay	£
Income Support / Job-Seeker's Allowance	£
Working tax credit	£
Child tax credit	£
Pension credit	£
State pension	£
Works pension	£
Employment & Support Allowance	£
Disability living allowance: - care component	£
- mobility component	£
Other disability benefits (please specify)	£
Child benefit	£
Other benefits (please specify)	£
Child maintenance / support	£
Contribution(s) from others living with you	£
Rent from lodger	£
Local Housing Allowance / Housing Benefit / Mortgage Interest Relief	£
Total	£
Other income e.g. from investment	£
Present value of savings and bank accounts held	£

We cannot accept monthly figures.
To change monthly figures to weekly:
1) Multiply by 12 (to give annual payment)
2) Divide the total by 52.

Tip: If you receive Disability Living Allowance, remember to show how you spend this money. Whether you use it as part of your general living costs or pay for a Carer, medication, transport etc, please make sure you show this in the expenditure column.

Food and housekeeping	£
Rent (including arrears if applicable)	£
Mortgage	£
Second mortgage	£
Endowment policy	£
Council tax (after benefit)	£
Water / sewerage charges	£
Electricity	£
Gas	£
Other fuel (e.g. coal, oil)	£
School meals	£
Telephone	£
TV / Satellite	£
TV Licence	£
Child care	£
Life / Building / Contents insurance	£
Car (loans / tax / fuel / repairs etc.)	£
Work expenses and travel	£
Loans / credit + store cards / catalogues (please provide details in section 9)	£
County Court Judgements (CCJs) / Court fines (please provide details in section 8)	£
Expenses for disability (please specify)	£
Other expenses (please specify)	£
TOTAL	£

Comments:

SECTION 8 ARE YOU IN DEBT WITH ANY OF THE FOLLOWING BILLS?

Please tick all that apply and write in the amount you owe and the amount being repaid.

	AMOUNT OWED	WEEKLY AMOUNT REPAID OR DEDUCTED FROM BENEFITS OR WAGES	NAME OF SUPPLIER
Rent <input type="checkbox"/>	£	£	
Mortgage <input type="checkbox"/>	£	£	
Second mortgage / secured loan <input type="checkbox"/>	£	£	
Council tax <input type="checkbox"/>	£	£	
Water and sewerage <input type="checkbox"/>	£	£	
Gas <input type="checkbox"/>	£	£	
Electricity <input type="checkbox"/>	£	£	
Telephone <input type="checkbox"/>	£	£	
Social Fund Loan <input type="checkbox"/>	£	£	
Benefit overpayment <input type="checkbox"/>	£	£	
CCJs / Court fines <input type="checkbox"/>	£	£	
Child Maintenance / support <input type="checkbox"/>	£	£	

Remember to include all repayments in section 7.

SECTION 9 LOANS, CREDIT & STORE CARDS, CATALOGUES ETC.

Name of creditor	Amount owed	Amount paid per week
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£
	£	£

Continue on a blank page if necessary. **Remember to include all repayments in section 7.**

IMPORTANT! – Please read carefully before completing the next page

FILLING IN THE NEXT PAGE

The next page is where you **must** explain how a payment from the Trust will help you. In deciding whether to help you with household **debts** the Trust will:

- need to know how you got into difficulties with the particular debt. You should give as much detail as possible about how **long** you have had problems in paying the bills and **why**.
- need to be sure that, if the Trust does help you, you will be able to manage to pay your bills in the future. This means that if, in section 7 you have more money going out than you have coming in, you should explain how you think you will be able to keep up with your bills in future.
- need to know about any particular hardship within your household e.g. chronic illness, disability, bereavement. Where possible evidence must be provided.
- need to know what might happen to you if the debt is not paid e.g. could you be evicted or your fuel supply be disconnected?

In deciding whether to help you with **one-off items** such as domestic appliances, the Trust will:

- need to know exactly what you want and how having the item is essential to your needs.
- need to know about any particular hardship within your household e.g. chronic illness, disability, bereavement.
- need supporting evidence from an appropriate professional confirming exceptional need exists for the item requested.

SECTION 10 WHY DO YOU WANT HELP WITH YOUR UTILITY DEBT?

Please tell us the problems you have had which have made it difficult for you to pay your gas, electricity, water or sewerage bills. Give as much detail as possible. **See guidance notes in section 13, 'your most recent utility bill', for details of supporting documents needed.** Continue on a blank page if necessary.

Please tell us how a payment from us would help you budget better in the future, and how you intend to make payments towards your ongoing usage.

SECTION 11 OTHER HELP (FURTHER ASSISTANCE PAYMENTS)

Complete this section if you are applying for help with other priority debts and essential household items. **Please see guidance notes at section 14.** Please tell us what you are applying for.

Please tell us how the need has come about and how a grant would help you.

SECTION 12 DECLARATION TO BE SIGNED BY THE APPLICANT

I consent to the personal details I have provided on this form being:

- (1) Shared with my Utility Company in relation to my account and the services provided by them.
- (2) Processed by Charis Grants Ltd in accordance with the Data Protection Act and as described in the 'How we deal with your application' section on the front cover of the application form.

I authorise Charis Grants Ltd to contact me directly about my application and to use my information for the purposes described above.

I declare that the information I have given on this form is complete and correct to the best of my knowledge.

I declare that in applying to the Trust I am committed to achieving future financial stability allowing me to keep up to date with current bills and avoiding getting into debt in the future. I understand that awards will only be granted to applicants who demonstrate their commitment to improving their own personal financial stability.

I wish to be considered for any additional funds, either administered by, or identified by Charis Grants Ltd that I am eligible to apply for.

I understand that the decisions of the Trust are final and that there is no appeals procedure.

Please tick the box to confirm the above declaration.

Signature

Print name

Date

AUTHORISED AGENCY ADVICE WORKER DECLARATION

Authorised Agency Ref no:

I declare that my client is receiving money advice, that I have seen evidence of their income and that they are in receipt of one or more of the benefits listed on the Trust's website.

Name of Advice worker

Organisation

Signed

Date

SECTION 13 FILLING IN THE APPLICATION FORM

Please make sure you enclose items on the checklist below with your application. **All evidence must be less than 3 months old.**

Please provide **copies** of **all** documents supporting your application as **we do not return originals**.

Proof of income (Except for applications from Authorised Money Advice Agencies where the applicant is in receipt of specified benefits. See the website www.edfenergytrust.org.uk for further details.)

You must provide proof with your application of income figures detailed in section 7 including:

- The current amount of net wages received by you and any partner
- The current amount of all benefits and pensions received by you and any partner
- The current amount of child maintenance / support received by you and any partner

Wages: copies of 3 recent consecutive wage-slips for you and for any partner. If you or your partner cannot provide wage-slips, please get a letter from the employer giving your recent average **net pay**.

Self employed applicants should send in recent three line accounts or another document confirming net income.

Benefits and Pensions:

- copies of current benefit, Tax Credit or pension payment slips or giro details showing amounts currently payable, or
- copies of bank statements showing current benefit, Tax Credit or pension payments, or
- copies of recent letters from the Department for Work and Pensions (DWP), HM Revenue and Customs (HMRC) or pension provider showing amounts currently payable.

If none of these are available, please obtain a letter from the DWP, HMRC or pension provider confirming the amount of your benefit, Tax Credit or pension entitlement.

Child Maintenance / Support: a copy of a recent letter from the Child Support Agency or a recent bank statement showing the amount payable to you or your partner or another letter or document confirming the current amount being paid.

Your most recent utility bill (and a meter reading entered in section 6)

If you are asking for help with gas, electricity, water or sewerage debts, please provide us with copies of your most recent bill(s). If you are asking for help with gas or electricity debts, meter readings must also be inserted in section 6 (taken on the day you submit your application).

Evidence of disability or other illness

If you are relying on a disability or illness as proof of hardship or need, please attach some independent evidence which confirms your medical condition: for example, a copy of a current sick certificate, a recent prescription or a letter from your GP / consultant to a third party confirming your condition.

Please note that the Trust is unable to meet the cost of obtaining medical evidence.

Please note that we cannot assess your application until all necessary supporting evidence is provided.

SECTION 14 HELP WITH OTHER BILLS AND COSTS (to be read with Section 11)

COUNCIL TAX DEBTS

Payment will only be considered in the most exceptional circumstances. Applications must always explain the history and current stage of enforcement.

OTHER KEY PRIORITY DEBTS

Payment may be considered where you can show that clearing these debts will enable you to budget better for your current bills.

You must attach a copy of your most recent bill or demand for payment showing the up to date balance on your account.

In the case of utility arrears, bills must be based on actual usage. Estimates cannot be accepted.

TELEPHONE DEBTS

Payment may be considered where there is a serious social or medical need for the phone to remain connected or to be reconnected. Such a need must be supported by evidence from someone like your GP, health visitor or social worker.

ESSENTIAL HOUSEHOLD ITEMS

Payments for items such as beds, cookers, washing machines or refrigerators may be made where a special need for the item can be shown. We will need a letter from an appropriate professional, e.g. health visitor, social worker or advice worker, confirming your need.

If you need the item because of illness or disability in your family, you will also need to send us some proof of that illness or disability.

The Trust should not be seen as an alternative to Social Fund Community Care Grants.

BOILER REPAIRS / REPLACEMENT

Payment will be considered, particularly where supporting letters from appropriate professionals confirming the need are provided. Quotes for the work are needed prior to an award of a grant and work commencing.

BANKRUPTCY DEPOSITS / DEBT RELIEF ORDERS (DRO)

Applicants must not have previously been declared bankrupt nor be a home owner. They must provide a full list of debts and have received advice from a professional advice worker or intermediary. **Bankruptcy applications** will not be considered from those with assets above a value of £1,000 and total debts less than £15,000. **DRO** applications MUST include the ID number generated by the Insolvency Service online application process.

FUNERAL EXPENSES

Payment may be considered where outstanding funeral expenses are causing hardship. Applications should indicate whether a payment has been received from the Social Fund towards those funeral expenses. Please tell us your relationship with the person who has died and why the estate of the deceased was unable to pay the funeral expenses.

RENT DEBTS

Payment will **only** be considered in the most **exceptional** circumstances. Applications must always explain the history and current stage of proceedings and provide supporting documentation.

MONITORING INFORMATION (THIS PART WILL BE DETACHED BEFORE ASSESSMENT)

Please tick as appropriate

Are you? Female Male Are you registered disabled? Yes No

What do you consider your ethnic origin to be?

WHITE	MIXED	ASIAN OR ASIAN BRITISH	BLACK OR BLACK BRITISH
<input type="checkbox"/> British	<input type="checkbox"/> White & Black Caribbean	<input type="checkbox"/> Indian	<input type="checkbox"/> Caribbean
<input type="checkbox"/> Irish	<input type="checkbox"/> White & Black African	<input type="checkbox"/> Pakistani	<input type="checkbox"/> African
<input type="checkbox"/> Any other White background	<input type="checkbox"/> White & Asian	<input type="checkbox"/> Bangladeshi	<input type="checkbox"/> Any other Black background
	<input type="checkbox"/> Any other Mixed background	<input type="checkbox"/> Any other Asian background	
CHINESE OR OTHER ETHNIC GROUP			
<input type="checkbox"/> Chinese	<input type="checkbox"/> Any other Ethnic Group		

The EDF Energy Trust is a registered charity receiving donations from EDF Energy. It operates independently of EDF Energy and is governed by a Board of independent Trustees. For further information on the Trust visit the website at www.edfenergytrust.org.uk

The day to day management of the EDF Energy Trust is undertaken by Charis Grants Ltd, a company with extensive experience in grants management on behalf of Trustees.

EDF Energy Trust charity number 1099446