

# EDF ENERGY TRUST

## APPLICATION FOR FINANCIAL ASSISTANCE

ALTERNATIVELY APPLY ONLINE VIA THE TRUST'S WEBSITE [WWW.EDFENERGYTRUST.ORG.UK](http://WWW.EDFENERGYTRUST.ORG.UK)

**BEFORE COMPLETING THIS APPLICATION FORM YOU ARE STRONGLY ADVISED TO OBTAIN FREE AND INDEPENDENT MONEY / DEBT ADVICE. THIS IS LIKELY TO INCREASE YOUR CHANCE OF SUCCESS TO THE TRUST, AND HELP YOU TO ADDRESS YOUR DEBTS AND KEEP UP TO DATE WITH CURRENT BILLS.**

The EDF Energy Trust funds a number of charitable organisations to provide such advice, as follows:

### Talking Money

T: 0117 954 3544

E: [energy@talkingmoney.org.uk](mailto:energy@talkingmoney.org.uk)

### Plymouth CAB

T: 01752 676091

E: [applications@plymouthcab.org.uk](mailto:applications@plymouthcab.org.uk)

### Citizens Advice Thanet

T: 01843 229696

E: [projectworker@thanetcitizensadvice.co.uk](mailto:projectworker@thanetcitizensadvice.co.uk)

Alternatively you may wish to contact the National Debtline on 0808 808 4000, [www.nationaldebtline.co.uk](http://www.nationaldebtline.co.uk), or StepChange Debt Charity on 0800 138 1111, [www.stepchange.org](http://www.stepchange.org)

The EDF Energy Trust's website [www.edfenergytrust.org.uk](http://www.edfenergytrust.org.uk) gives details of other agencies that provide free and independent money / debt advice.

### PLEASE READ THE FOLLOWING NOTES CAREFULLY

When you have completed the application form, these should be removed and kept 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?

- Current domestic account holders of EDF Energy (the person/s named on the bill) who are in need, hardship or other distress. Particularly those struggling to pay for domestic electricity and/or gas services.
- If the account holder is unable to complete the application, please explain why someone else is doing so on his or her behalf. The account holder **must** still sign the form.
- Grants are available to clear gas and electricity debts, and for a range of further assistance detailed at section 14. These grants are called Further Assistance Payments (FAPs).

### HOW CAN THE TRUST HELP

The Trust **can** consider applications for the following awards only:

- ✓ to clear domestic electricity and gas debts owed to EDF Energy.
- ✓ a range of other assistance detailed at Section 14. These grants are called Further Assistance Payments (FAPs).

The Trust **cannot** help with:

- ✗ Loans, or bills or items already paid for
- ✗ Fines for criminal offences
- ✗ Educational or training needs
- ✗ Debts to central or local government departments
- ✗ Deposits to secure accommodation, mortgage payments
- ✗ Medical equipment, aids and adaptations
- ✗ Overpayment of benefits
- ✗ Business debts
- ✗ Catalogues, credit cards, personal loans and other forms of non-secured lending
- ✗ Holidays
- ✗ Rent or Council Tax arrears
- ✗ Beds or carpets

Please note: The EDF Energy Trust is administered by Charis Grants Ltd (Charis) along with a number of other grant making funds, see [www.charisgrants.com](http://www.charisgrants.com) for details. 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.

## FILLING IN THE APPLICATION FORM

- You are strongly advised to obtain money/debt advice before applying to the Trust. See page 1.
- Please complete **all** sections of the application form. If a section is not applicable, insert N/A.
- If you need help with your electricity and / or gas debts, **you must provide:**
  - **A copy of your most recent bill, showing actual usage – NOT estimated.**
  - **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 advice will be available from your supplier.
- It is very important that you give as much information as possible about your circumstances in sections 10 and / or 11. **You must send proof of your income. All evidence must be less than 3 months old with the exception of annual benefit letters for State Pension / Works Pension / Disability Living Allowance (DLA) / Child Benefit.**
- Please supply **copies** of **all** supporting documents as we do not return originals.
- **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 EDF ENERGY TRUST**  
**Please note the address must be written as shown above. This is the full return address, a postcode is not required.**

## 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 gas and / or electricity debts, a payment will be made directly to your EDF Energy account. We will write to you to tell you that this payment has been made.
- If we are able to help with gas and electricity debts to another supplier and essential energy efficient white goods (FAPs), we will write to tell you. Cheques are made payable to the supplier and can only be used for that purpose.
- If we cannot help you with either kind of payment, we will write to tell you. The Trust may arrange for a money / debt advice agency, with which the Trust works in partnership (see page 1), to contact you to review your situation.
- If you qualify for assistance from any other fund administered by Charis (see [www.charisgrants.com](http://www.charisgrants.com)), your application will be considered automatically. We might need to ask you for more information.
- **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**. This applies to anyone else living in the household within the two year period.
- If you do not receive an award, you can re-apply at any time if your circumstances change.

**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

Did you obtain money / debt advice before applying to the Trust  Yes  No

If yes, name of money / debt advice agency

## SECTION 1 PLEASE TELL US ABOUT YOURSELF AND YOUR FAMILY

I am an EDF Energy customer  I am not an EDF Energy customer

Did you obtain money / debt advice before applying to the Trust? Yes  No

If yes, name of money / debt advice agency

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

Address

Postcode  Telephone  Email

Date of birth  National Insurance Number

Tick as appropriate:  Home owner  Rent from private Landlord  Social Housing

### 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: EDF Energy electricity debt  EDF Energy gas debt

I am applying for other assistance as detailed in section 14 (Further Assistance Payments (FAPs))

Detail other help sought

Please tick here if you would to receive an energy efficiency information pack

## SECTION 3 HAVE YOU APPLIED TO THIS TRUST BEFORE?

If you have 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?

Utility Company  Health Professional  Housing Agency  CAB  Advice Agency  Support Worker  Website

Media  Word of mouth Other - please state:

## 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  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 PLEASE GIVE US DETAILS OF RELEVANT ACCOUNTS

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

	Name of supplier	Account Number	Current meter reading	Date of Meter Read
Electricity (current)				
Electricity (previous)				
Gas (current)				
Gas (previous)				

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

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

Address  Postcode

## 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 (weekly figures)**.

### HOUSEHOLD WEEKLY INCOME

Proof confirming income must be provided. See Section 13.

Self-employed income £

Your take-home pay £

Your partner's take-home pay £

Job Seekers Allowance } Income based £   
Contribution based £

Income Support £

Working Tax Credit £

Universal Credit £

Child Tax Credit £

Child Benefit £

Child Maintenance / Support £

Maternity Pay / Allowance £

Employment & Support Allowance } Income based £   
Contribution based £

Statutory Sick Pay £

Incapacity Benefit £

Disability Living Allowance (care) £

PIP (daily living) £

Disability Living Allowance (mobility) £

PIP (mobility) £

Other disability benefits (please specify) £

Carer's Allowance £

Student Loan / NHS Bursary £

Contribution from son / daughter £

Income / rent from lodger £

State Pension £

Works Pension £

Pension Credit £

Private Pension £

Housing Benefit / Mortgage Interest Relief £

Other income e.g. investment £

**TOTAL** £

Present value of savings and bank accounts held £

### HOUSEHOLD WEEKLY EXPENDITURE

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

Food and Housekeeping £

Rent £

Rent Arrears (if applicable) £

Mortgage £

Second Mortgage £

Endowment Policy £

Buildings / contents / life Insurance £

Council Tax (after benefit) £

Water / sewage charges £

Electricity £

Gas £

Other fuel (e.g. coal, oil) £

TV Licence £

TV / Satellite £

Telephone (inc. mobiles) £

Appliance rental £

Hire purchase payments £

Cars (inc. loan / tax / fuel / repairs) £

Expenses for disability (please specify) £

£

£

£

£

£

£

£

£

£

£

£

£

Other Expenses (please specify) £

**TOTAL** £

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 whether you use it as part of your general living costs or to pay for a carer, medication, transport etc, in the expenditure column.

## 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.

## 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 further assistance 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 GAS AND/OR ELECTRICITY DEBT?**

Please tell us the problems you have had which have made it difficult for you to pay your gas and / or electricity 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

By signing this form, I consent to the personal information I have provided on this form and in support of my application being:

- (1) Shared with my Utility Company in relation to my account and the services provided by them.
- (2) Used by Charis Grants Ltd in accordance with the Data Protection Act, and shared with other funds / organisations, as described in the 'How we deal with your application' section of the form. If I am eligible for assistance from any other Trust / Fund administered by Charis operating a provisional award scheme I agree to the terms and conditions of the provisional awards offered under these schemes.

If I have provided personal information about any other person (e.g. my partner) in support of this application, I confirm that I have obtained consent from that person to the use and sharing of that information, as described above.

I authorise Charis Grants Ltd to contact me directly about my application, and 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.

To this aim I have sought money / debt advice (if appropriate) and am confident that I am receiving my full benefit entitlement.

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.**

Signature  Print name  Date

## SECTION 13 FILLING IN THE APPLICATION FORM

Please make sure you enclose items on the checklist below with your application. **All evidence excluding annual benefit letters for State Pension / Works Pension / Disability Living Allowance (DLA) / Child Benefit 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

**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. We just need to know the month, money earned during that month, allowable expenses and the net profit.

### 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)

The Trust is only able to help with requests for the following items. Requests for anything other than the items listed below will be unsuccessful.

### GAS AND ELECTRICITY DEBTS OWED TO SUPPLIERS OTHER THAN EDF ENERGY

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

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

Bills must be based on actual usage. Estimates cannot be accepted.

### ENERGY EFFICIENT WHITE GOODS

Energy efficient free standing white goods such as cookers, washing machines or refrigerators may be provided 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. **Only one item will be awarded per household and we are unable to provide integrated appliances.**

### BANKRUPTCY DEPOSITS / DEBT RELIEF ORDERS (DRO) / SCOTTISH BANKRUPTCIES (LILA)

Applicants must not have previously been declared bankrupt. 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 homeowners and 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.

---

## 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 visit the website at [www.edfenergytrust.org.uk](http://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.

[www.charisgrants.co.uk](http://www.charisgrants.co.uk)