

 **Hertfordshire Adviceline**

**BENEFIT ENTITLEMENT CHECKLIST**

**Not all questions have to be answered – only those relevant to you**

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| **Client Ref No.** |  | **DATE** |  |
| **Your Name** Mr/Mrs/Ms/Miss |  | **Partner Name**Mr/Mrs/Ms/Miss |  |
|  |  |
| **Date of Birth** |  | **Date of Birth** |  |
| **Disabled** | Yes | No | **Disabled** | Yes | No |
|  |
| **EMPLOYMENT STATUS** |
|  | Full Time | Part Time | Unemployed | Self Employed | Retired | Carer | Student | Other  | Hours Worked |
| You |  |  |  |  |  |  |  |  |  |
| Partner |  |  |  |  |  |  |  |  |  |

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| **HOUSING STATUS** |
| Owner Occupier |  | Housing Association |  | Living with Relatives |  | Private Rented |  | Local Authority Rented |  | Other |  |

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| **HOUSEHOLD DETAILS: OTHER PEOPLE LIVING IN YOUR HOUSEHOLD** |
| Name | M/F | Date of Birth | Relationship | DependantYes/No | Non Dependant Earnings/Benefits per week (£) | DisabledYes / No |
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| **REGISTERED CHILDCARE COSTS? Yes/ No** |
| Amount £  | Frequency |
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| **RENT** (As per Tenancy Agreement) | **MORTGAGE** | **COUNCIL TAX**(Annual Amount) |
| Weekly/Monthly  | Date Taken Out |  |  |
| **£** | Amount Outstanding | **£** | **£** |
| Number of bedrooms |  | Interest Rate | **%** |  |
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**Please turn over**

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| **INCOME** |
| Enter amount and frequency. Frequency may be weekly, fortnightly, monthly, four weekly, quarterly, half yearly or annually.  |

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| **Benefits for Household** | **Amount** | **Frequency** |
| Job Seekers Allowance *(Income Based)* | **£** |  |
| Job Seekers Allowance *(Contribution Based*) | **£** |  |
| Income Support | **£** |  |
| Child Benefit | **£** |  |
| Working Tax Credit | **£** |  |
| Child Tax Credit | **£** |  |
| Employment Support Allowance/ Incapacity Benefit | **£** |  |
| SSP | **£** |  |
| DLA/Attendance Allowance/PIP | **£** |  |
| Carers Allowance | **£** |  |
| Housing Benefit | **£** |  |
| Council Tax Support | **£** |  |
| Statutory Maternity Pay/Maternity Allowance/Adoption Pay | **£** |  |
| Universal Credit | **£** |  |
| Other (please specify) | **£** |  |

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| **Salary** | **Amount** | **Frequency** |
| Your Gross Earnings | **£** |  |
| Your Take Home Pay | **£** |  |
| Your Other Earnings | **£** |  |
| Partner’s Gross Earnings | **£** |  |
| Partner’s Take Home Pay | **£** |  |
| Partner’s Other Earnings | **£** |  |
|  |  |  |
| **Other Income** |
| Maintenance/Child Support  | **£** |  |
| Boarders or Lodgers | **£** |  |
| Non-dependant contributions | **£** |  |
| Student Loan/Grant | **£** |  |
| Other | **£** |  |
|  |  |  |
| **Pensions** |
| Your State Pension  | **£** |  |
| Your Private or Work Pension  | **£** |  |
| Pension Credit | **£** |  |
| Partner’s State Pension | **£** |  |
| Partner’s Private or Work Pension | **£** |  |
| Other | **£** |  |
|  |  |  |

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| **For Tax Credits we need details of previous year’s income** |
| **GROSS ANNUAL INCOME** |
| Previous Year  | Previous Year  |
| You | £ | Partner | £ |

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| **CAPITAL** |
| Please enter the current value and amount outstanding | Current Value | Mortgage or Finance Outstanding |
| House or Flat | **£** | **£** |
| Savings & Investments  | **£** | **£** |
| Other  | **£** | **£** |