



Full name & address: _____ _____ _____ _____	Telephone No: _____  Email address: _____  Date of birth: _____
If you were not employed by the Group, please give your relationship to the individual who was.	Relationship: _____
Do you live alone? <b>Yes/ No</b> _____  If 'No', please give details of all occupants including any dependant children and their ages _____	
<b>Application:</b> Total amount required:           £ _____  For what purpose? _____  Can you make any contribution? <b>Yes/ No</b> _____ If 'Yes', how much?                £ _____  <b>Amount requested from the Fund: £</b> _____	<b>Assets:</b> Self            Spouse/Partner  Cash, Savings and            £ _____ £ _____ Investments  <i>(Please provide full details on a separate sheet, including pension fund investments.)</i>  Do you own or rent your home? _____
<b>Monthly Income (net)</b> (see acronyms overleaf):  Bank pension                    £ _____ State retirement pension       £ _____ Allowances: PIP/ DLA/ ADP/ AA £ _____ Allowances: ESA/ UC/ PC       £ _____ Other earned income            £ _____ Other unearned income         £ _____ (e.g. other pensions, regular support from family)  Spouse/partner earned income   £ _____ Spouse/ partner unearned income £ _____	<b>Monthly Outgoings:</b> Self            Spouse/Partner  Rent/ Mortgage                £ _____ £ _____ Council Tax                     £ _____ £ _____ Housing service chg.         £ _____ £ _____ Gas/electricity/oil            £ _____ £ _____ Household shopping           £ _____ £ _____ Loans                             £ _____ £ _____ Carer costs                     £ _____ £ _____ Other                             £ _____ £ _____
Have you already approached any other charity or organisation for support for this purpose?	
If appropriate, do you consent to the Fund sharing your details with the Bank Workers Charity? <b>Yes/ No</b>	
Please give details of any previous applications to the Benevolent Fund:	
How did you hear about the Benevolent Fund?	

**Please provide:**

- a) evidence of Bank pension, or current or former NWG pension scheme membership,
- b) recent (no more than three months old) bank statements, covering at least one full calendar month, in your/ your spouse's name/ joint names **showing all income received**,
- c) any further information, such as state of health, which you may feel supports your application.

**At least two competitive quotes must also be provided for requested amounts over £750.**

The Trustees reserve the right to request further details of income and outgoings if considered necessary.

Signed \_\_\_\_\_ Dated \_\_\_\_\_

**Please read carefully the information overleaf and complete the consent form before submitting your application. Without it we cannot process your application.**

The completed form and documents should be emailed to [apply@nwgpensbenfund.org.uk](mailto:apply@nwgpensbenfund.org.uk) or sent to **The NatWest Group Pensioners Benevolent Fund, Freepost NWGBENFUND** (no stamp required).

# The NatWest Group Pensioners Benevolent Fund

## Data Protection Consent

The General Data Protection Regulations (GDPR) were introduced in May 2018. These require **The NatWest Group Pensioners Benevolent Fund** (“we”, “us”, “the Fund”) as the Data Controller of any information held about you to obtain active consent for personal data to be stored in its manual filing system or databases. Information is retained for the sole purposes of grant processing, analysis, administration and accounting.

1. Consent in accordance with GDPR must be given before grant applications can be processed.
2. At any time, you can ask for data to be removed from our databases other than the essential financial data required by our external examiners. Please write to us at Freepost NWGBENFUND or email us at [contact@nwgpensbenfund.org.uk](mailto:contact@nwgpensbenfund.org.uk).
3. If any of the information we hold about you is inaccurate or out of date, please email us at [contact@nwgpensbenfund.org.uk](mailto:contact@nwgpensbenfund.org.uk).
4. You can contact us to receive a copy of any personal information we hold on you once we have received proof of your identity.
5. Any details you give us will be held in accordance with GDPR and the Data Protection Act 1998.
6. We will not share your details with third parties, unless we have your explicit permission to do so, or we are required to do so by law, for example, by a court order or for the purposes of prevention of fraud or other crime.
7. We will not sell any personal information we hold about you.
8. We will not contact you except where you have provided personal information for a specific purpose (e.g. in support of a grant application) or to provide material updates about the Fund.
9. We retain information in order to process applications and for sound governance.
10. The Fund is committed to protecting the personal data of our beneficiaries, applicants, donors and colleagues. When you give us personal information, we take steps to ensure that it is treated securely. Information you send to us electronically is transmitted normally over the Internet, and this can never be guaranteed to be 100% secure. As a result, while we strive to protect your personal information, the Fund cannot guarantee the security of any information you transmit to us, and you do so at your own risk. Once we receive your information, we make our best effort to ensure its security on our systems, mainly in password-accessed databases.

By completing and submitting this form, you agree to us retaining the details enclosed in the application form, and any subsequent details you may provide to us in relation to your application, according to the terms and policies outlined above.

Name .....

Address.....

..... Post Code.....

**I agree to the Fund retaining the information provided unless I request otherwise, on the understanding that data will only be used according to the terms stated above.**

**Signature .....**

**Date .....**

A copy of the Fund’s Privacy Policy is available on request.

### Acronyms used overleaf:

PIP: Personal Independence Payment  
ESA: Employment & Support Allowance  
DLA: Disability Living Allowance  
AA: Attendance Allowance

UC: Universal Credit  
PC: Pension Credit  
ADP: Adult Disability Payment (Scotland)