The NatWest Group Pensioners Benevolent Fund

Registered Charity No. 277974

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? **Yes/ No** If 'No', please give details of all occupants including any dependant children and their ages	
Application: Total amount required: £ For what purpose? Can you make any contribution? **Yes/ No** If 'Yes', how much? £ **Amount requested from the Fund: £**	**Assets:** Do you own or rent your home? Self / Spouse/Partner Cash, Savings and Investments £ / £ *(Please provide full details on a separate sheet, including pension fund investments and second homes.)*
Monthly Income (net) (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, housing benefit, regular support from family) Spouse/partner earned income £ Spouse/ partner unearned income £	**Monthly Outgoings:** 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 us sharing your details with the Bank Workers Charity? **Yes/ No**	
Please give details of any previous applications to us:	
How did you hear about us?	

Please provide:

a) evidence of Bank pension, or current or former NWG pension scheme membership,
b) full 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 carefully read 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 or sent to **The NatWest Group Pensioners Benevolent Fund, Freepost NWGBENFUND** (no stamp required).

The NatWest Group Pensioners Benevolent Fund - Data Protection Consent Form

Under the UK Data Protection Act 2018 (DPA), **The NatWest Group Pensioners Benevolent Fund** ("we", "us", "the Fund") is the Data Controller of any information held about you for your application. We therefore need your consent to process and store your personal data for the purposes of grant processing, analysis, administration and accounting.

1. We can only process grant applications if we hold consent from you to use and store your data.
2. You can withdraw your consent at any time by writing to us at Freepost NWGBENFUND or email us at contact@nwgpensbenfund.org.uk. If you do this before a decision has been made on your application, your application will be closed without further consideration.
3. We retain application forms, supporting documents and any relevant personal data for a typical period of seven years. This supports the governance of the Fund, including financial audits.
4. You can ask for your data to be removed from our databases at any time, other than essential financial data required by our external examiners, using the contact details above.
5. It is your responsibility to ensure your contact details remain accurate. If any of your information is incorrect or out of date, please notify us at the details above.
6. You can request a copy of all personal data we hold about you at any time (subject to proof of your identity).
7. We will not share your details with third parties, unless we have your explicit permission (e.g. to engage other charities) or because we are required to do so by law (e.g. a court order).
8. We will never sell any personal information we hold about you.
9. We commit to protecting all personal data we receive and take steps to ensure it is treated securely in line with the DPA 2018, including restricted security access. However, please note that any information sent over the Internet can never be guaranteed as 100% secure. While we strive to protect your data, the Fund cannot guarantee the security of any information you send to us, and you do so at your own risk.
10. We will use the contact details you provide to keep you updated on progress, request more information where necessary, and arrange payment where approved. If you provide an email address, we may send you updates or information about the Fund from time to time in accordance with our Legitimate Interests. You can unsubscribe from these at any time.
11. When an application is completed, we will request feedback on your experience to help us improve (as per our Legitimate Interests under the DPA). Giving feedback is optional but if you don't want us to contact you for this, please let us know using the details above.

I have read the Data Protection Consent Form and agree to the Fund using and retaining the information I provide in line with these terms, unless I notify the Fund otherwise.

Name:

Address:

Post Code:

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)

THIS FORM IS AVAILABLE IN LARGE PRINT ON REQUEST