

Guidance Notes 2020

Professionals Aid Guild

Application form for general financial assistance and Children's Education

Eligibility criteria

You should only complete the form for general assistance from the Professionals Aid Guild if you fulfil **ALL** of the following criteria;

1. Have a post graduate degree level qualification or the equivalent level qualification (level 7 on the education framework or above). You may also be eligible through your spouse or partner, if living together in the same household, or if widowed.
2. Are aged over 18 years
3. Are resident in the UK
4. Have applied to your own occupational fund for assistance in the first instance (if applicable)
5. Have less than £6,000 in savings if you are under pension credit age and less than £10,000 if over pension credit age.
6. Have claimed, or are in the process of claiming, all benefits to which you are entitled.

Please read these notes before completing your application form for assistance from the Professionals Aid Guild. The notes will help you to complete your application form accurately. You must complete the application form in full and provide COPIES of supporting documentation where necessary as we **cannot** return original documents. You must download and read the privacy policy and complete section 12 to demonstrate that you have read and understood how we process your data. You can download our privacy policy from our website www.professionalsaid.org.uk.

Please note that we are unable to help with the following;

- Private medical fees, including prescription charges
- Vet bills or pet insurance
- Bankruptcy fees
- Debts, including mortgage repayments and/or utility bills
- Purchase of electronic equipment, including computers and stereos
- Purchase of cars or other vehicles
- Funeral costs
- Costs associated with setting up your own business
- Respite breaks.

We have provided a checklist to make sure you have included all necessary documents (see section 13 on the application form). Go through this checklist carefully and tick all the documentation that applies to you. The form should be completed in black or blue pen and should be written clearly and legibly. All copies of supporting documentation should be included with the original signed copy of your application form. Please do not send separate pieces of documentation. You must post your application to us at the address given at the end of the application form - **we do not accept emailed applications**.

Failure to provide all the correct information/documentation will delay your application. Please make sure that you complete all sections. We will not consider incomplete forms or forms without necessary documents. We deal with each complete application in the order received. All applications are discussed by the PAG Committee, so please note that the process takes several weeks to complete. You will be notified of their decision as soon as possible.

Section 1 - Main details of applicants

- Make sure all your contact details are accurate to enable us to contact you when necessary. This is especially important if we require further information.
- Where options are listed please circle the appropriate choice for you.
- You must provide a copy of photographic identification and be able to demonstrate your residency status in the UK.

Section 2 - Others living in household

- Include details of anyone else who lives with you regardless of whether they contribute to your household income e.g. children, parents, partners, friends.
- If they DO contribute to the household income, they must **also** be listed in section 8. You must provide copies of documentation to show their income.

Section 3 - Professional and educational background

- Give details of ALL employment, both paid and voluntary, for at least the last FIVE years. Give these details even if you are now retired.
- Start with your most recent post covering all periods including any when you were unemployed. You may continue on a separate sheet of paper if necessary. Please do not send a CV. We need employment dates and details for at least the last FIVE years (if applicable).
- You must provide a copy of your certificate showing your qualifying post graduate degree or equivalent professional qualification at Level 7 or above on the education framework. It is your responsibility to provide evidence if you believe your qualification is the equivalent to level 7 on the education framework.
- If your qualification is gained abroad, either provide evidence from your educational institution or awarding body or NARIC to confirm that your overseas qualification is comparable to the UK systems www.naric.org.uk.
- Provide information on the education and occupation of your spouse/partner in section 3.3. Please provide as much detail as possible in this section as you may be eligible through one of their qualifications.

Section 4 - Children

- Complete this section for all children in full-time education in your household. State the type of school that your child attends e.g. state school, academy, grammar school, independent or public school.

Section 5 - Other charitable help

- You **MUST** approach your own occupational charity/benevolent fund (if applicable) before applying to us.
- List the names of all charities that you have applied to during the past year.
- Please include details of the charities' decisions.
- If you have obtained an award, include the amount, the date it was awarded, and how you used, or intend to use the funds. Please provide copies of award letters where applicable.
- Indicate in section 5.2 where you heard about our charity.
- In section 5.3, indicate if you have applied to our charity previously and if you have received any financial assistance from our charity. If you have obtained an award, include the amount and the date it was awarded.

Section 6 - References

- Include the names of two referees. You must provide their title and full addresses and email address
- Referees must be based in the UK.
- Referees must have known you for a minimum of two years.
- Referees cannot be relatives.
- Suggestions for appropriate references are, but are not limited to: family friend, healthcare worker, or work colleague.
- We will approach your referees during the application process. Please note that this is not an indicator that a financial award will be made. If the committee grants you financial assistance, we will advise you of the committee's decision after we have received satisfactory references.

Section 7 - Request for funding

- Clearly outline your current circumstances and what assistance you are requesting. Please provide as much detail that is relevant to your application as possible. For example, information could include details of your health, family circumstances, and the reason for your present difficulties.

Section 8 - Income and expenditure

- Complete all this information in the sections provided on the application form. **Do not** use a separate page.
- Provide as accurate a figure as possible. If you do not have a standard figure or your income/expenditure fluctuates every week, then please estimate an average weekly figure.
- If you are only contributing a portion of the household income (e.g. living with parents, flat share etc.) then please indicate the amounts you contribute and the relevant expenditure.
- Provide a copy of evidence for all applicable income and expenditure; e.g. annual notification of pension(s), benefits and salary/wage slips. For the full list of documents we require, please see the checklist in section 13.
- You must provide evidence of your rent agreement or your mortgage repayments. You must also provide your annual council tax notice to show the amount payable and any reduction for the year.
- Do not include cost of TV viewing packages (e.g. SKY, Virgin) in the telephone/internet/mobile expenditure.

Section 9 - Capital/savings

- Give details of ALL bank accounts you hold. Bank accounts must be supported by copies of statements from the last THREE full calendar months.
- You must also include the bank accounts of your spouse/partner/any other members of household contributing to household income, if applicable.
- If you own your property, give the approximate current value of your home, the term of the mortgage, and any mortgage outstanding providing copies of documents to demonstrate this.

Section 10 - Debts

- Outline all loans and debts that you currently have, what they are for, how much you repay per month, the balance outstanding, and the number of years remaining on the debt or loan.
- If you have a debt repayment plan, please give details and provide copies of the agreement. You could also include the information in Section 8.

Section 11 - General Data Protection Regulations (2018)

- You must download and read the Privacy Policy carefully to make sure that you are fully aware of how we process your data. You can download the Privacy Policy from our website www.professionalsaid.org.uk. You must sign and date this section to confirm that you have read and understood the policy.
- If you have included information on a spouse/partner then they must also read the Privacy Policy and sign this section.
- You must ensure that you read the statement on explicit consent for us to process any possible special category of data. You and your spouse/partner (if applicable) must sign and date this section also.
- You may withdraw your consent for us to use your data at any time and details on how to do this are included on the Privacy Policy.

Section 12 - Agreement and Declaration

- You must read, sign and date the declaration section of the form. We cannot accept unsigned applications.
- If you have provided information on your spouse/partner then they must also sign this section.

Section 13 - Checklist - Documents required

- You must send copies of all documents, **with** the original signed application, as we cannot return originals.
- Use this section to ensure that you have included all copies of supporting documentation that we require. Please check this thoroughly before returning the form to us.
- Do not send your application form and supporting documents by email.
- Ensure that you send the form and all documents to us with the correct postage to: The Professionals Aid Guild, 10 St Christopher's Place, London W1U 1HZ.

When we have received your full application with all accompanying documents, we will acknowledge receipt. If you need further assistance completing the form please call 0207 935 0641 or email admin@professionalsaid.org.uk