

Guidance Notes
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 the following criteria;

- Have received assistance from Professionals Aid Guild previously

OR if you fulfil ALL the of the following criteria:

- 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.
- Are aged over 18 years
- Are resident in the UK
- Have less than £6,000 in savings if you are under pension credit age and less than £10,000 if over pension credit age.
- 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 upload COPIES of supporting documentation where indicated. You must read the Privacy Policy and confirm that you agree for your data to be processed under the terms of the Privacy Agreement before you start a new application. You can also 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 cars or other vehicles
- Funeral costs
- Costs associated with setting up your own business
- Respite breaks.

We have provided a document checklist on page 5/6 to make sure you have included all necessary documents. Go through this checklist carefully and ensure you have uploaded all the documentation that applies to you. The form should be completed online. If you require a paper copy of the form then please contact us on admin@professionalsaid.org.uk.

Failure to provide all the correct information/documentation will delay your application. Please make sure that you complete all sections. We will not be able to 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 - Your contact details

- 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 select the appropriate choice for you.
- You must complete all mandatory fields in order to submit your application

Section 2 - More about you

- Document Checklist: You **MUST** upload a copy of photographic identification in Section 2.1. This may be a copy of your driving licence, passport or identity card.
- You must be able to demonstrate your residency status in the UK

Section 3 - Others living in your 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. To add each household member including children, click on the + button at the top right of the table.
- If they **DO** contribute to the household income, they must **also** be listed in section 8: Household income and expenditure. You must upload copies of documentation to show their income.
- Give details of any children of school age in full-time education in your household in Section 3.3. State the name, type of school (e.g. state school, academy, grammar school or independent), academic year that your child attends. To add each child of school age, click on the + button at the top right of the table. You should provide details of school age children, even if you have added their details in section 3.2.

Section 4 - Professional and educational background

- Give details of ALL employment, both paid and voluntary, for at least the last THREE years. Give these details even if you are unemployed or now retired.
- Start with your most recent post covering all periods including any when you were unemployed. We need employment dates and details for at least the last THREE years (if applicable). Click the + button to add each role.
- Give details of all higher/ further education qualifications. Click the + button to add each qualification.
- Document Checklist: You **MUST** upload a copy of your certificate showing your qualifying post graduate degree or equivalent professional qualification at Level 7 or above on the education framework in section 4.2. **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 ENIC (previously NARIC) to confirm that your overseas qualification is comparable to the UK systems <https://www.enic.org.uk/>.
- Provide information on the education and occupation of your spouse/partner in section 4.5. Please provide as much detail as possible in this section as you may be eligible through one of their qualifications. Click on the + button to add details of your spouse/ partner's higher level qualification if applicable.

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, postal and email addresses
- 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

- Please select what type of assistance you are requesting and your main reason for applying. You may select more than one.
- Clearly outline your current circumstances. 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 FORGET TO GO TO PAGE 2 OF THE TABLES AS INDICATED.**
- 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 have a monthly figure, please multiply this by 12 (months) to get a yearly figure and divide this by 52 (weeks) to get a more accurate 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 demonstrating income we require, please see the Document Checklist section at the end of the guidance notes.
- 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. For the full list of documents demonstrating expenditure we require, please see the Document Checklist section at the end of the guidance notes.
- Do not include cost of TV viewing packages (e.g. SKY, Virgin) in the telephone/internet/mobile expenditure.
- Child maintenance refers to the specific payments related to separated parent. Child maintenance in the income section of the table applies to those parents who **receive** financial remuneration from the other parent who does not live with you towards the upkeep of your children. Child maintenance in the expenditure section applies only to a parent who **pays** the financial amount towards a child who does not live with them. You should not use this section to input any other children's costs than those specified.
- Registered childcare costs refer to a nursery or childminder setting. Please provide documentation to demonstrate your weekly costs.

- You should only provide a figure for debt repayment (in the expenditure section) if you have a formally agreed debt repayment plan with a provider such as Payplan or StepChange in which you have consolidated your debts.
- Mobility car costs apply to those people who receive DLA/PIP towards mobility. It does not apply to hire purchase vehicle costs.

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.
- Document Checklist: You MUST upload the last THREE months bank statements for ALL bank accounts held in section 9.2. The bank statements must clearly display your name, sort-code and account number, as well as full transactions. You must submit the bank statements for all bank accounts regardless if you have a nil or low balance or have recently open the account. Failure to disclose full information on your bank accounts could result in the withdrawal of any grant that the PAG may award.
- If you have newly opened a bank account then please provide as many statements as possible.
- 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 formal debt repayment plan, please give details and provide copies of the agreement. You could also include the information in Section 8.3.

Section 11 - Equality and Diversity Monitoring

- We collect equality data in order to understand who applies to us for financial assistance, so that we can improve our services and make them relevant to as many eligible applicants as possible.
- All details will be held in accordance with The Data Protection Act (1998)/ General Data Protection Regulation (GDPR) and will be used only for monitoring purposes.
- Although we welcome any information you may provide, there is no obligation to complete this section.
- The Equality Act 2010 defines disability as ‘a physical or mental impairment which has a substantial and long-term effect on a person’s ability to carry out normal day to day activities’.

Section Review and Submit

- Please review your application and complete all mandatory fields on the form. You also have the option to print your application in progress form.
- Please ensure that you have included all copies of supporting documentation that we require and check this thoroughly against the Checklist section below before you submit your application
- You must read the declaration section of the form and confirm that you have read our privacy policy before you submit your application.
- You will receive an automatic acknowledgement email on your registered email address after submission of your application

If you any queries or need further assistance completing the form please call 0207 935 0641 or email admin@professionalsaid.org.uk

CHECKLIST - Documentation Required: - Please ensure that you have included all documents that are applicable to you. Failure to provide all the correct documentation will delay your application.

General - required for ALL applications

Description	Copy Enclosed?
Bank/ Building Society Statements - The last THREE months full bank statements for ALL bank accounts held.	
Proof of Identity - This may be a copy of your Driving Licence or Passport. It must be photographic identification.	
Degree/equivalent professional qualification certificate - Please provide a copy of your certificate(s)	

Documents demonstrating income - provide the most recent supporting documentation for income you are receiving, as specified in Section 8.

Type of Income	Copy Enclosed?	
	Yes	N/A
Salary/Wages - You MUST provide a P60 or payslips for the last three months/ or a copy of company accounts/annual tax return for the last 12 months (if self-employed).		
Child Maintenance - Official letter demonstrating agreement		
Other Charities - If you have been awarded a grant/gift from any other charities provide all award letters		
Occupational Pension -Annual notification letter or monthly payslip		
Private Pension -Annual notification letter or monthly payslip		
State Pension - Annual notification letter		
Pension Credit - Annual notification letter		
Annuity - Annual notification letter		
Universal Credit - Award notification showing all details		
Jobseeker's Allowance - Award notification letter		
Income Support -Award notification letter		
Employment and Support Allowance -Award notification letter		
Bereavement Allowance - Award notification letter		
Attendance Allowance -Award notification letter		
Carer's Allowance -Award notification letter		
Personal Independence Payment (PIP) -Award notification letter		
Disability Living Allowance (Care) - Award notification letter		
Disability Living Allowance (Mobility) -Award notification letter		
Housing Benefit -Award notification letter		
Support for Mortgage Interest (SMI) - Award notification letter		
Council Tax Benefit -Council tax annual notice		
Working Tax Credit -Award notification letter		
Child Tax Credit -Award notification letter		
Child Benefit - Award notification letter		
Local Authority Contribution to nursing/residential care fees -Award notification letter. We also require evidence demonstrating this expenditure.		

Documents demonstrating expenditure - provide the most recent copies of documentation demonstrating ALL relevant expenditure as specified in section 8 of the form.

Type of Expenditure	Copy Enclosed?	
	Yes	N/A
Rent/Mortgage Documents - Letter from landlord/provider giving your rent and/or mortgage payments. Mortgage statements must also give the value of the property and the outstanding mortgage.		
Council Tax Bill - Most recent council tax bill demonstrating amount for year and any reductions		
Buildings Insurance - Recent renewal notice		
Contents Insurance - Recent renewal notice		
Car Insurance - Recent renewal notice		
TV Licence - Recent renewal notice		
Telephone/Internet/Mobile - Recent bill		
Road Tax - Recent renewal notice		
Registered childcare costs - Three months invoices/receipts		

Other Documents

Description	Copy Enclosed?	
	Yes	N/A
Loan Agreements - e.g. Letters demonstrating any loan agreements.		
Debt Repayment Plans - e.g. Letter demonstrating repayment plan and estimated repayment date.		