

Financial Planning information Form

For Your relative

Date completed	
----------------	--

Name of person completing the form:	
-------------------------------------	--

Name of your relative	
Date of Birth	
Family Carer (s) Name	
Family Carer Tel Number	
Address	

Benefit Information

<p>Do they receive benefits? (Fill in Benefit Sheet attached)</p> <p>Is your relative on the right benefits?</p> <ul style="list-style-type: none">• Universal Credit• Disability living Allowance• Personal Independence Payment• Employment Support Allowance• Pension• Housing Benefit• Any others?	
<p>How does your relative access their money?</p>	
<p>Have they had a capacity assessment to determine whether they can manage their own finances?</p>	
<p>Do they have a named appointee to manage their benefits?</p> <p>Name of appointee:</p> <p>Contact details:</p>	
<p>Have you thought about who can take on the appointeeship when you can no longer do it?</p> <p>Who:</p> <p>Relationship to your relative:</p> <p>Contact Details:</p>	
<p>If your relative has capacity to manage their own benefits, do they need some support to manage their own finances?</p>	
<p>Do they have a <u>power of attorney</u>?</p> <p>Name of Power of Attorney?</p> <p>Contact details:</p>	

<p>Who might be able to support them when you are no longer able to do so?</p> <p>Name:</p> <p>Contact details:</p>	
<p>Do they manage their own finances without any support at all?</p>	

Personal Budget from Adult Social Care or Continuing Health Care

<p><u>Personal Budget</u></p> <p>Does your relative get a personal budget for adult social care support?</p> <p>How do they receive the personal budget? Direct payment Managed Account Combination of Both</p> <p>If a Direct Payment who is the person responsible for managing the Direct Payment?</p> <p>Do you get an invoice from the provider or pay by direct debit?</p>	
<p><u>Financial Contribution</u></p> <p>Does your relative have to contribute towards the cost of their social care?</p> <p>If yes, how/when is it paid?</p>	
<p><u>Continuing Health Care (CHC)</u></p> <p>Is your relative in receipt of CHC?</p> <p>How are the invoices sent/paid?</p> <p>Who is responsible for paying the invoices?</p>	
<p>Who will take on the role of managing your relatives Personal Budget and paying their bills?</p>	

Bank Accounts

<p>Does your relative have a separate bank account?</p> <p>If not, whose bank account does their benefits and/or direct payment get paid in to?</p>	
<p>Bank</p> <p>Type of Account</p> <p>Account Number</p> <p>Sort Code</p> <p>Do they have their own bank card?</p> <p>Online Access</p> <p>What is this bank account used for?</p>	<p>Notes</p>
<p>Bank</p> <p>Type of Account</p> <p>Account Number</p> <p>Sort Code</p> <p>Do they have their own bank card?</p> <p>Online Access</p> <p>What is this bank account used for?</p>	<p>Notes</p>
<p>Bank</p> <p>Type of Account</p> <p>Account Number</p> <p>Sort Code</p> <p>Do they have their own bank card?</p> <p>Online Access</p> <p>What is this bank account used for?</p>	<p>Notes</p>
<p>Bank</p> <p>Type of Account</p> <p>Account Number</p> <p>Sort Code</p> <p>Do they have their own bank card?</p>	<p>Notes</p>

<p>Online Access</p> <p>What is this bank account used for?</p>	
<p>Anything else people who are supporting your relative should know?</p>	

For the Family Carer

Making decisions about leaving your money and assets is an important part of planning for the future. If you are planning to leave something for your relative with a learning disability, this should be done in a way that will be recognised in law rather than relying on a friend or relative. If your relative with a learning disability is receiving local authority funding or means tested benefits, you need to protect their inheritance by setting up a trust with your will.

Will

Do you have a Will?	
Does your executor know where the Will is kept?	
Solicitor Details Tel: Address	
Funeral Arrangements:	

Trust

Have you set up a Discretionary or Disabled Person's Trust? Does your relative have a lifetime trust? (This allows you to transfer some or all your assets to a trust while you are still alive)	
Trustees' details? Do the trustees understand what their responsibilities are?	
Solicitor Details Tel: Address:	

<p>Letter of wishes</p> <p>Have you written a letter of wishes?</p> <p>Have you included a copy in this folder? If not, does the executor know where it is?</p>	

Deputyship for Property and Finance

Have you applied to the Court of Protection for Deputyship for Property and Finance?	
Date Applied	
Name and details of Deputies	
Where is the copy of the deputyship order kept?	
What level of supervision do you have? Minimal or General	
How often do you submit financial details to the Office of the Public Guardian?	
Date of last submission	
How do you submit financial details online/post?	
Do all Deputies have the log in details if online submission?	

Any other essential information?

