

Notes to help you fill in the form

Pension Credit

These notes explain how to fill in each part of the Pension Credit application form.

Part 1 About you

Use this part of the application form to tell us your personal details.

Why have you asked for my phone number?

It is useful for us to be able to phone you if we have a question about your application. This saves time and could save you having to fill in more forms.

Why have you asked for the name and address of my most convenient Post Office® branch?

We still need Post Office® details even if your money is paid into an account.

Part 2 About your partner

If you have a partner, use this part of the application form to tell us your partner's personal details. We use 'partner' to mean:

- a person you are married to or a person you live with as if you are married to them, or
- a civil partner or a person you live with as if you are civil partners.

If you or your partner live permanently in a care home

If you or your partner live permanently in a care home, you should not apply as a couple. Each of you should fill in your own application form.

Part 3 About where you live

Use this part of the form to tell us about where you live. We need to know about where you live because you may be able to get help with rent, Council Tax or other housing costs – for example, service charges or mortgage payments.

Which people living in my household do I need to tell you about?

When you tell us if you have people who live in your household, you **do not** need to count:

- people who just share a hall, bathroom or toilet with you
- other residents if you are staying temporarily in a care home
- children under the age of 16
- foster children or children who board with you while they are waiting to be adopted.

Please **do** count anyone else who lives with you, including:

- relatives, including your grown-up children
- boarders and lodgers
- friends.

Can I get help with my rent and Council Tax?

If you or your partner are responsible for rent or Council Tax for the place where you live, you may get help with the cost through Housing Benefit and Council Tax Benefit. The Pension Service can now help you apply for Housing Benefit and Council Tax Benefit at the same time as your application for Pension Credit.

What should I do if my rent or Council Tax is being paid by Housing Benefit or Council Tax Benefit already?

If you or your partner are getting Housing Benefit or Council Tax Benefit, please tick **Yes** to the question 'Are you or your partner responsible for paying rent or Council Tax for the place where you live?'

Can I get help with my ground rent? In Scotland, this is called 'ground annual'.

If you pay ground rent, you may get extra Pension Credit. Please send us proof of your ground rent, even if it is a small amount. For example, your tenancy agreement or a letter asking you for ground rent.

Part 3 **About where you live** continued

What if I am a Crown tenant, pay chief rent or pay other rent charges?

If you or your partner are a Crown tenant, pay chief rent or other rent charges, please tell us in **Part 11 – Other information** how much rent you are charged and how much is included in the rent for water. We will get in touch with you if we need more information. Chief rent is money paid for freehold properties to the Lord of the Manor. If you pay similar types of rent, you should also tell us about this.

Can I get help with my mortgage or home loan?

If you have a mortgage or home loan, you may get extra Pension Credit. Please fill in the form **MI12(PC)** that came with this application form. Then send the filled-in form **MI12(PC)** to your mortgage or home loan lender. After they have filled in the rest of the form, they will send it back to us.

If you are getting Income Support or income-based Jobseeker's Allowance, we may not have given you form **MI12(PC)** because we already have the information we need.

What if I have more than one mortgage or home loan with different lenders?

You could have a mortgage from a building society and a home improvement loan from a bank, for example. If you have a mortgage or home loan with more than one lender, please tell us in **Part 11 – Other information** of the application form. We will send you a form **MI12(PC)** for you and each lender to fill in.

Part 4 About money you have, including savings and investments

Use this part of the application form to tell us how much your savings and investments add up to. Please also tell us whether or not you own, or jointly own, any property or land in this country or abroad – other than the place where you live.

The amount of savings, investments, property or land that you or your partner have may affect how much Pension Credit you get.

If your savings and investments are more than £10,000, please fill in form **PC1H – More information about savings and investments**. PC1H comes with this form.

How do savings and investments affect Pension Credit?

Savings and investments of £10,000 or less do not affect Pension Credit.

If you have savings and investments of more than £10,000, we count £1 a week as income for each £500, or part of £500, you have above £10,000.

People aged 65 and over who have saved some money towards their retirement such as in a pension, may be able to get extra money from Savings Credit up to:

- £18.54 a week if you are single, or
- £23.73 a week if you have a partner.

What types of savings and investments do I need to tell you about?

We have listed the types of savings and investments you need to tell us about in **Part 4** of form **PC1**. But people sometimes make mistakes when they think about capital, savings and investments. We have included some of the questions they ask below.

If I have an account to pay my bills, do I need to include this as part of my savings?

Yes. You need to include all the bank accounts that you and your partner have.

Do I need to include all the money I have at home as part of my savings?

Yes. We need to know how much money you and your partner have, even if you keep it at home to pay bills or for any other reason.

Part 4 About money you have, including savings and investments continued

Do I need to include my partner's savings?

Yes. You need to include your partner's savings and investments, including shares. You do not need to tell us about your partner's savings if you are separated from them or if they are permanently in a care home.

Do I need to include my shares as part of my savings? I don't know how much they are worth.

If you have shares you must tell us about them. We know people can sometimes get confused about stocks and shares they may have from building societies, ISAs or elsewhere. The current value of your shares is not the value printed on the share certificate. You can check the current value in the FTSE index in most newspapers. If you are not sure how to find out the value of your shares, or if you have any other questions, you can phone us on **0800 99 1234**.

What types of property or land do I need to tell you about?

You do not need to tell us about the place where you normally live, even if you own it outright.

You **do** need to tell us about any other property or land that you **or your partner** own in this country or abroad, even if you have a mortgage or loan to pay for it. This could be:

- a holiday home in this country or abroad
- property that you rent out in this country or abroad
- property that you own, but relatives are living there
- a time-share property
- stables
- farmland or a paddock.

Part 5 About benefits

Use this part of the application form to tell us about:

- Carer's Allowance paid to someone who is caring for you or your partner, or
- Carer's Allowance which could not be paid to someone for looking after you or your partner because they are already receiving another benefit. For example, if someone already receives Incapacity Benefit or Employment and Support Allowance, they cannot be paid Carer's Allowance as well.

Part 6 About pensions

Use this part of the application form to tell us about any pensions you or your partner have, other than any State Pension paid by The Pension Service. Please include any pension that is paid to someone else on your behalf. Please also tell us if you or your partner expect to get a pension in the next 12 months.

What proof of pensions do I need to send you?

Please send us your latest pension payslip, if you have one, or anything else that shows how much you get or will get. But **do not** send us form **P60**.

Important

Any documents you send us as proof of a pension should be original documents. They should show:

- who pays the pension
- when you get the pension
- any money taken off your pension
- how often the pension is paid
- how much is paid
- when you get a pension increase
- the rate at which the pension increases.

I have paid into a private pension scheme but don't get any money from it? Do I need to tell you about it?

Yes, please tell us if you or your partner have paid into a private pension scheme from which you do not get any money. This could be because you have:

- chosen to put off getting money from the scheme
- not claimed money that you could have claimed
- a retirement annuity contract which you have not used to buy an annuity.

Please tell us as much as you can about this in **Part 11**. Please send us proof of how much the pension would pay and how often.

What type of pension do I need to tell you about?

Please tell us about all the pensions you or your partner have. For example:

- a pension, superannuation or other money from a place you or your partner used to work.
- a pension, superannuation or other money from a place your late partner used to work
- money from a private pension scheme – for example, from a pensions or insurance company
- a Civil List pension
- money from an annuity, even if it is not a pension – for example, a home income plan

Part 6 **About pensions** continued

- any War Pension or Armed Forces Compensation Payment paid by the British Government. But you do not need to send proof of a payment from the Armed Forces Compensation Scheme.
- Police and Fireman's Disablement Pension
- Police and Fireman's Widow's Pension
- Iron and Steel Re-adaptation Benefits Scheme
- Redundant Mineworker's Pension Scheme
- Shipbuilding Redundancy Payment Scheme
- a pension received from abroad
- the Pension Protection Fund
- the Financial Assistance Scheme (FAS).

Part 7 **About work**

Use this part of the application form to tell us about:

- self-employed work you or your partner have retired from or left in the last three months
- any paid work that you or your partner are doing at the moment.

I left self-employed work in the last three months but did not retire. Do I need to tell you about this?

Yes. Please tell us if you or your partner have left self-employed work for any reason in the last three months.

What types of work do I need to tell you about?

The types of work we need to know about are:

- any work for an employer
- permanent or casual work
- self-employed or subcontracting work.

Do I need to tell you about work I don't get paid for?

No. We do not need to know about unpaid work.

I am working and am not sure if I can get Pension Credit. What should I do?

If you are working and are not sure whether to apply for Pension Credit, please get in touch with us for advice. You can phone The Pension Service. The phone number is **0800 99 1234**.

Part 8 About other money coming in

Use this part of the application form to tell us about other money you or your partner have coming in. Please include any money that is paid direct to someone else on your behalf. Please also tell us if you or your partner expect to start getting money in the next 12 months.

Does all money coming in affect the amount of Pension Credit I can get?

No, not all money coming in affects the amount of Pension Credit you may get. It depends on what the money is. Please give us as much information as you can about the money you or your partner have coming in. This will help us decide if we can ignore any of it.

What type of money do I need to tell you about?

Please **do not** tell us about social security benefits or State Pension paid by The Pension Service. We already have this information.

Please **do** tell us about any of the following types of money you or your partner have coming in.

- Money from someone who rents a room in your home or who lives in part of your home – for example, a boarder, lodger, tenant or subtenant.
- Working Tax Credit.
- Money from a pension paid to victims of Nazi persecution.
- Royalties or money for a book registered under the Public Lending Rights Scheme.
- Money from your ex-partner to pay for day-to-day living costs. You do not need to send proof of this type of income
- Social security benefits from abroad.
- Money from a war disablement pension or war widow's or widower's pension from abroad.
- Sick pay.
- Regular payments from a trust.
- Money from an equity release scheme.
- Money from the Armed Forces Compensation Scheme. You do not need to send proof of a payment from the Armed Forces Compensation Scheme.

What proof of money coming in do I need to send you?

If you have any money coming in, please send us, with your application form, proof of the amount of money and when it is paid. Please send us the original statement or any other official document that shows the amount you get.

This could be a:

- statement from the person or company that pays the money
- court order
- bank statement showing the amount paid
- payment advice slip.

Part 8 About other money coming in continued

Please remember that if we do not receive proof of money coming in by the date on the front of the application form, it may affect the date we can pay you from.

We will do our best to return them within five working days of getting them.

Important

Any documents you send us as proof of the money you have coming in should be original documents. They should show:

- who pays the money
- when you get the money
- the amount you get, or the amount you expect to get
- what the money is for.

I can't get any proof of the money I have coming in. What should I do?

If you cannot get proof of the money you have coming in, please tell us why in **Part 11 – Other information** of the application form. Please send us your application form straight away. We may still be able to pay you Pension Credit.

Part 9 Special circumstances

Use this part of the application form to tell us about any special circumstances that apply to you or your partner, if you have one.

Some of the information in this section is to help us decide if you have a right to reside and are habitually resident in the United Kingdom, the Republic of Ireland, the Isle of Man or the Channel Islands. This is why we ask questions about your nationality or if you have returned from abroad.

How do I know if the Home Office has put a limit on how long I can stay?

It will be clearly marked on one of the pages of your passport.

Part 10 When you want to apply from

Use this part of the application form to tell us the date you want to apply from. You may be able to get Pension Credit if you have reached the qualifying age, and live in Great Britain. The age from which you may get Pension Credit – the qualifying age – is gradually going up to 66 in line with the increase in State Pension age for women to 65, and the further increase to 66 for men and women. To find out the age you may be able to apply for Pension Credit, please see the tables below.

Date you were born	Date you will reach the Pension Credit qualifying age
On or before 5 March 1951	You have already reached the qualifying age
6 March 1951 to 5 April 1951	6 March 2012
6 April 1951 to 5 May 1951	6 May 2012
6 May 1951 to 5 June 1951	6 July 2012
6 June 1951 to 5 July 1951	6 September 2012
6 July 1951 to 5 August 1951	6 November 2012
6 August 1951 to 5 September 1951	6 January 2013
6 September 1951 to 5 October 1951	6 March 2013
6 October 1951 to 5 November 1951	6 May 2013
6 November 1951 to 5 December 1951	6 July 2013
6 December 1951 to 5 January 1952	6 September 2013
6 January 1952 to 5 February 1952	6 November 2013
6 February 1952 to 5 March 1952	6 January 2014
6 March 1952 to 5 April 1952	6 March 2014
6 April 1952 to 5 May 1952	6 May 2014
6 May 1952 to 5 June 1952	6 July 2014
6 June 1952 to 5 July 1952	6 September 2014

Part 10 When you want to apply from continued

The qualifying age

Tick this box if:

- you reached the qualifying age in the last 3 months or you will reach it in the next 4 months, and
- you retired from full-time work before the qualifying age, or you plan to retire before then.

Example

John's date of birth is 7 May 1951. John will reach the qualifying age on 6 July 2012, when he is aged 61 and 2 months. He works full time until this date. He fills in his application form in February 2012.

John could be entitled to Pension Credit from 6 July 2012, so he ticks the box marked **The qualifying age** on his application form.

Another date

Tick this box and fill in the date if:

- you think you had too much money coming in to get Pension Credit, but think the money has gone down since, or
- you think you have too much money coming in to get Pension Credit now, but in the next 4 months you expect to have less money coming in.

Put the date the money went down, or the date you expect the money to go down, and tell us why you are choosing the date. If we think you could be entitled to Pension Credit before the date you have chosen, we will get in touch with you.

Example

Eddie is 63. He was earning £250 a week until he retired on 1 September 2011. He fills in his application form in November 2011.

Eddie thinks he was earning too much money to be entitled to Pension Credit before he retired on 1 September 2011.

Eddie ticks the box marked **Another date** on his application form.

He tells us that he retired on 1 September 2011 and that he was earning £250 a week.

Part 10 When you want to apply from continued

It is too early to apply if:

- you are under the qualifying age, and you will not reach that age in the next four months, or
- you are still working full time and you do not plan to retire within the next four months.

If you are not sure what date to choose, you can phone The Pension Service on **0800 99 1234**. We can help you decide which date to choose if you tell us your circumstances.

How does the date I want to apply from affect what I need to tell you?

If the date is in the past

If the date you think you want to apply from is in the past, tell us in **Part 11 – Other information** about any differences between what you have told us on the application form and your circumstances since the date you have chosen.

The things you need to tell us about in **Part 11 – Other information** include:

- time spent by you or your partner in hospital as an inpatient
- time spent out of Great Britain. *Great Britain* is England, Scotland and Wales
- changes to your money coming in
- changes to your savings and investments – but you do not need to tell us about changes to your savings and investments if they were always less than £10,000
- if you or your partner have been admitted into a care home
- if you or your partner have moved out of a care home
- if you had a partner who died in the last 3 months. You may be able to get extra money
- if you had a partner who separated from you in the last 3 months. You may be able to get extra money.

Example

Sarah's date of birth is 10 January 1951, so she reached the qualifying age on 6 November 2011. She worked part time for several years but stopped in December 2011. She fills in her application form in January 2012.

Sarah thinks she could be entitled to Pension Credit from 6 November 2011, so she decides to tick the box marked **The qualifying age** on her application form.

Sarah must tell us in **Part 11** of the application form about her part time earnings from the date she reached the qualifying age. She uses **Part 11** of the form to tell us about her earnings from 6 November 2011 to 6 January 2012 when she stopped work.

Part 10 When you want to apply from continued

If the date is in the future

If the date you want to apply from is in the future, tell us in **Part 11 – Other information** if you expect anything you have told us on the application form to change before that date.

Example

Imran's date of birth is 7 June 1951, so he will reach the qualifying age on 6 September 2012. He expects to stop work in October 2012. He fills in his application form in July 2012.

Imran thinks he will be entitled to Pension Credit from October 2012 when he stops work. He must tell us about his work in **Part 7** of the application form. He must also tell us in **Part 11** that he expects to stop work in October 2012.

Part 11 Other information

Use this part of the application form to tell us any other information about your circumstances.

What type of things should I tell you about?

Please tell us:

- if your partner is living away from you – for example, because they are working away from home
- if you or your partner have more than one mortgage lender or home loan lender
- if you or your partner are a Crown tenant, if you pay chief rent or pay other rent charges
- about any property or land you or your partner own, apart from the place where you live
- if you or your partner pay Business Rates on any part of the place where you live
- about any pensions you did not have room to tell us about in **Part 6**
- if you or your partner have been admitted into a care home
- if you or your partner have moved out of a care home
- about a private pension scheme you have paid into but do not get any money from
- if, within the last 28 weeks, you or your partner have regained your sight after being registered blind
- about anything we have asked about in **Part 10**. If you tell us about changes to money coming in or savings or investments, please send us proof of the changes
- if you or your partner have ever received a lump-sum payment as a result of putting off claiming State Pension – please use **Part 11** to tell us about the amount of the award
- if you or your partner care for someone who is receiving Attendance Allowance or Disability Living Allowance at the middle or highest rate of the care component – please give the full name, address, date of birth or National Insurance number, if known, of the person being cared for and the person caring for them
- If you complete a Self Assessment tax return and pay your tax direct to HM Revenue & Customs, please tell us how much Income Tax you will pay or expect to pay for the current tax year. This is because Pension Credit takes account of your net income after tax, including any tax due in respect of your State Pension, which is taxable. Telling us about the tax you pay helps us make sure you are getting the correct amount of Pension Credit and may mean that you get more.

You can find out more about Income Tax at www.hmrc.gov.uk or by phoning the tax office. You can find the number in the phone book under HM Revenue & Customs.

You can also use **Part 11** to tell us about anything else you think will give us a fuller picture of your circumstances.

Part 12 How we pay you

Use this part of the application form to give us the information we need to pay you.

We normally pay Pension Credit into an account. Many banks and building societies will let you collect your money at the post office.

How often we will pay you

If you reached State Pension age before 6 April 2010 we will pay your Pension Credit to you weekly in advance.

If you reach or have reached State Pension age on or after 6 April 2010 we will normally pay you 4 weekly in arrears.

If, before applying for Pension Credit, you were receiving Income Support, Jobseeker's Allowance, Employment and Support Allowance or Incapacity Benefit we will continue to pay you in the same frequency, if this is how you wish to be paid.

You should always complete the box on the application form which asks you how often you wish to be paid.

About the account you want to use

You can use:

- an account in your name
- a joint account, or
- someone else's account, if
 - the terms and conditions of the account allow this, and
 - they agree to let you use the account, and
 - you are sure they will use your money in the way you tell them.

If you are an **appointee** or a **legal representative** acting on behalf of the customer, the account should be in your name only.

You can use a credit union account. You must tell us the credit union's account details. Your credit union will be able to help you with this.

How we will pay you

We will tell you when we make the first payment and how much it will be for. We will tell you if the amount we pay into the account will change.

Finding out how much we have paid into the account

You can check your payments on account statements. The statements may show your National Insurance (NI) number next to any payments we have made. If you think a payment is wrong, get in touch with the office that pays you straight away.

Part 12 **How we pay you** continued

Can someone else collect my Pension Credit for me?

You may be able to get someone else to collect your Pension Credit for you regularly if you wish. For help with this, please contact your bank or building society.

If we pay you too much money

We have the right to take back any money we pay you that you are not entitled to. This may be because of the way the system works for payments into an account.

For example, you may give us some information which means you are entitled to less money. Sometimes we may not be able to change the amount we have already paid you. This means we will have paid you money that you are not entitled to.

We will contact you before we take back any money.

I have an account but I do not want to use it. What can I do?

If you have an account but do not want to use it – for example, a joint account – any bank or building society will help you open an account that suits you better. Remember to ask whether their accounts allow you to get your money from a post office, if this is important to you.

I do not have a suitable account. What can I do?

If you do not have a suitable account, any bank or building society will help you open an account. If you want to get your money at a post office, check that the account allows you to do this.

If you have had problems opening a current account, or if you are worried about being overdrawn, you could ask any bank or building society about opening a basic bank account. These are available from all major banks and offer free banking with no overdraft facility. You can use these accounts to pay money in, pay bills automatically, and get cash out. Many basic bank accounts also allow you to get cash from post offices.

Or, you can be paid into some Credit Union accounts. These accounts may have restrictions on the services provided.

Fill in the Pension Credit application form and send it to us. Do not wait until you have opened an account. **Please tell us your account details as soon as you have them.**

Part 13 Your declaration

Important

It is important that you sign and date the application form. If you do not, we will have to send it back to you.

Can I sign the application form for someone else?

You should only sign the application form on behalf of someone else if:

- the person who is making the application is not mentally able to act on their own behalf, and
- you are willing to act on their behalf in all social security matters, including telling us about any change in their circumstances and collecting their money for them.

You should **not** sign the application form for someone who **is** mentally able to manage their own affairs. Someone who is physically disabled but mentally able will not normally need someone to act for them.

I want to act for someone who is not mentally able to manage their own affairs.

What happens next?

We will get in touch with you to arrange a visit to see you and the person making the application. This will help us decide whether the person needs someone to act on their behalf for all social security matters. We call these people 'appointees'. We will explain to you the responsibilities of an appointee.

I have power of attorney for the person making the application. What should I do?

If you have power of attorney or any legal authority to act on behalf of the person making the application and the Department has approved your authority to act on behalf of the person making the application, you can sign the application for them. Please let us know if we have accepted the authority before so that we can check our records.

If the Department has never approved the legal authority, please contact us so that we can discuss this with you. Our phone number is **0800 99 1234**.

Part 14 What to do now

Use this part of the application form to tell us which documents you are sending us. We will return all the documents to you. We will do our best to return them within five working days of getting them.

Before you send us your application form, **please check** that you:

- are sending us all the original documents we have asked for – for example, payslips, proof of a private or works pension
- have answered all the questions that apply to you and your partner, if you have one
- have signed and dated **Part 13 – Your declaration**.

Send your Pension Credit application form and other documents to us as soon as you can.

Use the envelope that came in your application pack. It does not need a stamp.

This booklet gives general information only and is not a complete statement of the law.

The amounts in this booklet are the ones that apply from 9 April 2012.

The amounts usually change each April.

Your application form

Pension Credit

If you need help with this form

- You can phone **The Pension Service**.
Lines are open Monday to Friday from 8am to 8pm.
The number is Freephone **0800 99 1234** .
If you have speech or hearing difficulties
you can contact us using a textphone on **0800 169 0133**.
- Before you fill in this form, please read the booklet
Notes to help you fill in the form that came with this form.
- You can ask a friend or advice centre to help you.

About your application

Please make sure you:

- answer all the questions on the form that apply to you and your partner, if you have one, and
- sign and date the form and send it back to us with all the documents we have asked for.

Part 1 About you

Your title

Mr / Mrs / Miss / Ms

Other title

Your surname or family name

All your other names in full

Any other surnames or family names you have been known by or are using now

Include maiden names, all former married names and all changes of surname or family name.

Your date of birth

Your National Insurance (NI) number

Letters Numbers Letter

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You can get this from your payslips, National Insurance number card, tax papers or letters about social security benefits and entitlements.

Your permanent address

Postcode

Your contact address

if it is different from above

Postcode

Your daytime phone number

if you have one

Code

Number

What is this number?

Home Work Mobile Fax

Your textphone number

if you have one, for people with speech or hearing difficulties

Code

Number

What is the name and address of your most convenient Post Office® branch?

Postcode

Would you have difficulty getting to this Post Office® branch?

No

Yes

Part 1 About you continued

Are you registered blind or severely sight impaired? No
Yes

Are you able to speak to us in English? No
Yes

If you answered **No**, please tell us the language you would like us to use when we speak to you.

If you live in Wales, do you want to speak to us in Welsh? No
Yes

Tick here to show if you want us to contact you about this application in one of these ways.

If you choose one of these options, every time we contact you about your application we will do it in that way, if we can.

You will need to let us know about this again if you contact us. Eventually you will not have to tell us more than once.

- Braille
- Text Relay
- Large Print
- Audio
- Sign Language
- Induction Loop

Part 2 About your partner

Do you have a partner?

We use 'partner' to mean:

- a person you are married to or a person you live with as if you are married to them, or
- a civil partner or a person you live with as if you are civil partners.

No Please go to **Part 3**.

Yes Please tell us about this below.

Does your partner live permanently in a care home?

No

Yes Please go to **Part 3**.

Are you separated from your partner?

If you are separated only because someone is temporarily in a hospital or care home, tick **No**.

No

Yes Please go to **Part 3**.

Does your partner agree to you making this application?

No Please still tell us as much as you can about your partner.

Yes

Your partner's title

Mr / Mrs / Miss / Ms

Other title

Your partner's surname or family name

Your partner's other names in full

Any other surnames or family names your partner has been known by or is using now

Include maiden names, all former married names and all changes of surname or family name.

Your partner's date of birth

/ /

Your partner's National Insurance (NI) number

Letters Numbers Letter

You can get this from theirr payslips, National Insurance number card, tax papers or letters about social security benefits and entitlements.

Is your partner registered blind or severely sight impaired?

No

Yes

Part 3 About where you live

Do you live permanently in a care home?

No

Yes Do you own the property you used to live in?

No Please go to **Part 4**.

Yes Please go to **Part 4**.

Does anyone live in your household apart from you and your partner?

No

Yes Please tell us their name and relationship to you.

Are you or your partner responsible for paying the rent or Council Tax for the place where you live?

No

Yes What is the name of your council?

If they are paid through Housing Benefit or Council Tax Benefit, still tick **Yes**.

Have you claimed, or are you about to claim, Housing Benefit?

No

Yes

Have you claimed, or are you about to claim, Council Tax Benefit?

No

Yes

Do you or your partner pay service charges for the place where you live?

No

Yes

For example, money towards the upkeep of the building. In Scotland, this is sometimes called *factoring*.

Do you rent the property or own it?

Rent it

Own it

Do you or your partner pay ground rent for the place where you live?

No

Yes

In Scotland, this is called *ground annual*.

When the lease on your home was first granted, was it for more than 21 years?

No

Yes

Do you or your partner share with anyone else the rent or mortgage for the place where you live?

No

Yes


If you and your partner just share with each other, tick **No**.

Do you or your partner have a mortgage or home loan on your home?

No

Yes

Part 4 About money you have, including savings and investments

 Please read **Part 4** of the booklet **Notes to help you fill in the form** before you fill in this part.

We need to know if you or your partner have any money, including savings or investments.

We may be able to reward you for any money, including savings and investments, you have.

By *savings and investments* we mean:

- money in a current account, even if you use the account to pay your bills so the balance changes
- a savings or deposit account, even if you have to give notice to withdraw the money
- money in any other bank, building society or Post Office® account
- National Savings Certificates
- cash saved for something
- Premium Bonds
- investments like ISAs, PEPs and TOISAs
- an income bond, capital bond or granny bond
- unit trusts or shares, even if the shares are part of a windfall payment
- any other money, property or investments you or your partner have in this country or abroad.

Do you or your partner have any money, including savings or investments?

No

Yes What is the total amount?

£

Apart from the place where you live, do you or your partner own any other property or land in this country or abroad?

If it is on a mortgage or loan, still tick **Yes**.

No

Yes Please tell us about this below.

If you need tell us more, please use the space at **Part 11**.

Does your money, including savings and investments, add up to more than £10,000?

No Please go to **Part 5**.

Yes Please tell us about your money, savings and investments on **pages 7 to 10**.

Part 4

About money you have, including savings and investments continued

Please use the boxes below to tell us how your money, including savings or investments, are made up. Please write **NONE** in the boxes that do not apply to you.

We may be able to reward you for any money, including savings and investments, you have. If you have a partner, include their money, including savings and investments.

Money in a bank current account

Money in any other bank account

Money in a building society current account

Money in any other building society account

Money in a Post Office® account

Cash saved for something

National Savings Certificates

Certificate issue number

Number of units held

National Savings Certificates

Certificate issue number

Number of units held

Premium Bonds

Income bonds or capital bonds

Unit trusts, ISAs, PEPs, TOISAs or other investments

Money or property held in trust

Part 4 About money you have, including savings and investments continued

Shares – approximate value	<input type="text" value="£"/>
Name of the company the shares are held in	<input type="text"/>
Number of shares held	<input type="text"/>
Share type By <i>share type</i> we mean things like ordinary shares, B shares or preference shares.	<input type="text"/>

Shares – approximate value	<input type="text" value="£"/>
Name of the company the shares are held in	<input type="text"/>
Number of shares held	<input type="text"/>
Share type	<input type="text"/>

Shares – approximate value	<input type="text" value="£"/>
Name of the company the shares are held in	<input type="text"/>
Number of shares held	<input type="text"/>
Share type	<input type="text"/>

Any other money or investments	<input type="text" value="£"/>
Type of other money or investment	<input type="text"/>

Total savings and investments	<input type="text" value="£"/>
--------------------------------------	--------------------------------

The proof you need to send us

We need to see proof of all your savings and investments.

The proof you send us could include:

- bank statement
- savings account book
- unit trust certificate
- letter of ownership.

Please make sure any savings account books have been updated before you send them, as this will save time.

Any documents you send us must be originals, not photocopies. We will do our best to return them within 5 working days of getting them.

Please tick which original documents you are sending us.

- bank statement
- savings account book
- unit trust certificate
- letter of ownership
- proof of other investments – for example ISAs, PEPs, TOISAs.

Part 4

About money you have, including savings and investments continued

We can ignore some types of savings or investments. Please use the boxes below to tell us if your savings or investments include these types of money.

Please write **NONE** in the boxes that do not apply to you.

Money from an insurance policy for repair or replacement of your home or personal possessions

£

When did you get this?

/ /

Money from the sale of your home to be used to buy a new home

£

When did you get this?

/ /

Money paid to you to carry out essential repairs to your home

£

When did you get this?

/ /

A Social Fund payment or arrears of:

- Attendance Allowance
- Child Benefit
- Child Tax Credit
- Constant Attendance Allowance
- Council Tax Benefit
- Disability Living Allowance
- Exceptionally Severe Disablement Allowance
- Housing Benefit
- Income Support
- income-related Employment and Support Allowance
- income-based Jobseeker's Allowance
- Pension Credit, or
- a payment from Housing Related Support Services – this may be from the Supporting People Programme.

£

When did you get this?

/ /

Have you or your partner had a compensation payment for a personal injury?

No

Yes

How much did you get?

£

Is this held in trust?

No

Yes

Part 4

About money you have, including savings and investments continued

Have you or your partner had a payment from the vCJD, MacFarlane, Eileen or Skipton Trusts?

No

Yes

If you need to tell us about more than one payment, please use the space in **Other information**.

How much did you get?

£

When did you get this?

/ /

Have you or your partner had a lump sum payment as a result of putting off claiming State Pension?

No

Yes

How much did you get?

£

Have you or your partner had a special payment because of atrocities that happened during the Second World War or from the Armed Forces Compensation Scheme?

No

Yes

How much did you get?

£

Have you or your partner had a special payment made to Far Eastern Prisoners of War or internees?

No

Yes

How much did you get?

£

Part 5 About benefits

	You	Your partner
Have you or your partner claimed any social security benefits that you are waiting to hear about?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Which benefits are you waiting to hear about?		

Does anyone get Carer's Allowance for looking after you or your partner? Tick Yes if they have claimed it and are waiting to hear about it or could not be paid Carer's Allowance because they receive another benefit.	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
The carer's full name		

The carer's National Insurance (NI) number	Letters Numbers Letter	Letters Numbers Letter
	<input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>	<input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid black;" type="text"/>

Do you or your partner spend 35 hours a week, or more, looking after someone who is getting or waiting to hear about	No <input type="radio"/> Yes <input type="radio"/> Don't know <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/> Don't know <input type="radio"/>
<ul style="list-style-type: none"> ● Attendance Allowance ● Constant Attendance Allowance, or ● Disability Living Allowance? 		

Part 6 About pensions

! Please read **Part 6** of the booklet **Notes to help you fill in the form** before you fill in this part.

Have you or your partner paid into a private pension scheme from which you do not expect to get money in the next 12 months?

No

Yes

Do you or your partner get a private pension, money from a place where you used to work or any other pension?

No Please go to **Part 7**.

Yes Please tell us about this below. If you need to tell us about more than two pensions, please use the space in **Part 11**.

If you or your partner expect to get a pension in the next 12 months, please tick **Yes**. Do not count any State Pension paid by The Pension Service.

	Pension 1	Pension 2
Who pays the pension?	<input type="text"/>	<input type="text"/>
What type of pension is it?	<input type="text"/>	<input type="text"/>
How much is paid?	£ <input type="text"/>	£ <input type="text"/>
How often is it paid?	Every <input type="text"/>	Every <input type="text"/>
When is the pension normally received? For example, the last day of the month.	<input type="text"/>	<input type="text"/>
When did you receive your latest payment?	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>
Does the pension increase each year?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Who gets the pension?	You <input type="radio"/> Your partner <input type="radio"/>	You <input type="radio"/> Your partner <input type="radio"/>
If you or your partner expect to get a pension in the next 12 months, when do you expect to get the first payment?	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Please send us your latest pension payslip, if you have one, or anything else that shows how much you get or will get. If you send us bank statements, we will need to see at least two bank statements in a row. Do not send us form P60.

Part 7

About work

	You	Your partner
Have you or your partner left self-employed work in the last three months?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Date you or your partner left work	<input type="text" value=" / /"/>	<input type="text" value=" / /"/>
Are you or your partner doing any type of paid work now?	No <input type="radio"/> Please go to Part 8 . Yes <input type="radio"/>	No <input type="radio"/> Please go to Part 8 . Yes <input type="radio"/>
Is this self-employed work?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>

Part 8 About other money coming in

Do you or your partner have any other money coming in? No

Yes Please tell us about this money below.

You do not need to tell us about social security benefits paid by the British Government in this part. Please read **Part 8** of the booklet **Notes to help you fill in the form** for details of what you should tell us about.

What is this money?

How much is paid and how often?

Who is paid the money?

You Your partner

You Your partner

You Your partner

You Your partner

You Your partner

You Your partner

Please send us proof of the money coming in with this form, if possible. If we do not receive proof of the money you have coming in, it may affect the date we can pay you from. Any documents you send us must be originals, not photocopies. We will return all the documents to you.

Do you or your partner expect to start getting any money in the next 12 months? No

Yes Who will pay this money?

If you expect to get a lump sum payment, please tell us about this in **Part 11**.

By *lump sum payment* we mean something like

- money coming in from the sale of a house you used to live in, or
- a one-off payment you will get instead of a private pension.

How much will be paid?

Who will be paid?

You Your partner

When do you or your partner expect to start getting this money?

Part 9

Special circumstances

	You	Your partner
Are you or your partner in hospital as an inpatient?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
What date did you or your partner go into hospital?	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>
Name of the hospital	<input style="width: 250px; height: 50px;" type="text"/>	<input style="width: 250px; height: 50px;" type="text"/>

Are you or your partner staying temporarily in a care home?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
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Everyone must answer these questions, if you do not your application may be delayed. By *United Kingdom* we mean England, Scotland, Wales and Northern Ireland.

If a UK national, do you or your partner have the right of abode in the United Kingdom?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
--	---	---

For example, you have the right of abode in the United Kingdom if you are a British citizen.

By *right of abode* we mean you

- are free from immigration control, **and**
- do not need the permission of an immigration officer to enter the United Kingdom, **and**
- can live and work in the United Kingdom without restriction.

At any time, have you or your partner come to live or returned to live in the United Kingdom from abroad?	No <input type="radio"/> Yes <input type="radio"/> Please tell us about this below.	No <input type="radio"/> Yes <input type="radio"/> Please tell us about this below.
--	--	--

Please send passport or immigration documents to us, with this form, for the people you tell us about below. Or you can bring the passport or documents to us.

To find out the address of where to bring your documents, phone us on **0800 99 1234**. Or visit **www.direct.gov.uk/pensions**

What is your nationality?	<input style="width: 250px; height: 30px;" type="text"/>	<input style="width: 250px; height: 30px;" type="text"/>
Which country have you come from?	<input style="width: 250px; height: 30px;" type="text"/>	<input style="width: 250px; height: 30px;" type="text"/>
What date did you last come to the United Kingdom?	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>

Part 9

Special circumstances continued


	You	Your partner
Was this to work in the United Kingdom?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Has the Home Office put a limit on how long you can stay in the United Kingdom?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Does your passport say no recourse to public funds ?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
If you have lived in the United Kingdom before, when did you last leave the United Kingdom?	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>
Have you or your partner come to the United Kingdom under the Family Reunion Scheme?	No <input type="radio"/> Yes <input type="radio"/>	No <input type="radio"/> Yes <input type="radio"/>
Have you or your partner come to the United Kingdom under a sponsorship undertaking? A 'sponsorship undertaking' is a form that a relative must sign to say that they will pay for your living expenses if you settle in the United Kingdom. You can find out more by visiting www.ukvisas.gov.uk A sponsorship undertaking is not the same as the Family Reunion Scheme.	No <input type="radio"/> Yes <input type="radio"/> Please tell us about this below.	No <input type="radio"/> Yes <input type="radio"/> Please tell us about this below.
Name of the sponsor	<input style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
Address of the sponsor	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>	<input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/>
Home Office reference number	<input style="width: 100%; height: 30px;" type="text"/>	<input style="width: 100%; height: 30px;" type="text"/>
What date did the sponsor sign the sponsorship undertaking? If more than one sponsor signed the sponsorship undertaking, please tell us about them in Part 11 .	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>	<input style="width: 100px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/> / <input style="width: 30px; height: 20px;" type="text"/>

We may get in touch with you for more information.

Please answer all of these questions, even if you think they do not apply to you.

	You	Your partner
<p>Are you or your partner an asylum seeker?</p>	<p>No <input type="radio"/></p> <p>Yes <input type="radio"/></p>	<p>No <input type="radio"/></p> <p>Yes <input type="radio"/></p>
<p>Did you or your partner first apply for asylum before 3 April 2000?</p>	<p>No <input type="radio"/> If you are still an asylum seeker, you will not usually be entitled to benefit. But you may be entitled to get help from the Home Office.</p> <p>Yes <input type="radio"/> Send us proof of the asylum application with this form. Or you can bring the proof to us.</p>	<p>No <input type="radio"/> If you are still an asylum seeker, you will not usually be entitled to benefit. But you may be entitled to get help from the Home Office.</p> <p>Yes <input type="radio"/> Send us proof of the asylum application with this form. Or you can bring the proof to us.</p>
<p>Have you or your partner recently had a successful decision on your asylum application?</p>	<p>No <input type="radio"/></p> <p>Yes <input type="radio"/> Send us proof of the decision with this form. Or bring the proof to us.</p>	<p>No <input type="radio"/></p> <p>Yes <input type="radio"/> Send us proof of the decision with this form. Or bring the proof to us.</p>
<p>What was the date when you got the successful decision of your asylum application?</p>	<div style="border: 1px solid black; padding: 5px; width: 150px; margin: 0 auto;"> / / </div>	<div style="border: 1px solid black; padding: 5px; width: 150px; margin: 0 auto;"> / / </div>
<p>Have you or your partner been supported by the Home Office while waiting for a decision on your asylum application?</p>	<p>No <input type="radio"/> Please go to Part 10.</p> <p>Yes <input type="radio"/> Send us details of any support given to you by the Home Office. For example, a letter from the Home Office which tells us about these things.</p>	<p>No <input type="radio"/> Please go to Part 10.</p> <p>Yes <input type="radio"/> Send us details of any support given to you by the Home Office. For example, a letter from the Home Office which tells us about these things.</p>

Part 10 When you want to apply from

 Please read **Part 10** of the booklet **Notes to help you fill in the form** before you fill in this part.

When do you want to apply from?

We will consider your application from the date you choose. Please tick one box.

The qualifying age

Another date Please tell us about this below.

What date do you want to apply from?

If this date is in the past, please tell us about how your circumstances have changed since then. To find out what you need to tell us, please read **Part 10** of the booklet **Notes to help you fill in the form**.

Please tell us why you think you qualify from this date.

If you need to tell us more, please use the space at **Part 11**.

Part 11 Other information



Please read **Part 11** of the booklet **Notes to help you fill in the form** before you fill in this part.

Please use this space to tell us anything else you think we might need to know. You can continue on a separate sheet of paper if you need to.

If you continue on a separate sheet of paper, please make sure you:

- sign and date it, and
- write your full name, address and National Insurance (NI) number on it.

Part 12 How we pay you



Please read **Part 12** of the booklet **Notes to help you fill in the form** before you fill in this part.

We normally pay Pension Credit into an account. Please tell us your account details below. By giving us your account details you are agreeing to be paid by Direct Payment and understand the information in **Part 12** of the information booklet about being overpaid.

It is very important you fill in **all** the boxes correctly, including the building society roll or reference number if you have one. If you tell us the wrong account details your payment may be delayed or you may lose money.

How often do you want to be paid?

- 4-weekly
 fortnightly
 weekly

You can find the account details on your chequebook or bank statements. If you are not sure about the details, ask the bank or building society.

If you are going to open an account, please tell us your account details as soon as you get them.

If you do not have an account, please contact us and we will give you more information.

About the account you want to use

Name of the account holder

Please write the name of the account holder exactly as it is shown on the chequebook or statement.

Full name of bank or building society

Sort code

Please tell us all 6 numbers, for example 12-34-56.

 - -

Account number

Most account numbers are 8 numbers long. If your account number has fewer than 10 numbers, please fill in the numbers from the left.

Building society roll or reference number

If you are using a building society account you may need to tell us a roll or reference number. This may be made up of letters and numbers, and may be up to 18 characters long. If you are not sure if the account has a roll or reference number, ask the building society.

You may get other benefits and entitlements we do not pay into an account.

If you want us to pay them into the account above, please tick the box.

Fill in the rest of this form. You do not have to wait until you have opened an account or contacted us.

Part 14 What to do now

● Please make sure you have signed and dated the declaration in Part 13.

● Please check:

- that you are sending us all the original documents we have asked for – for example, pension payslips
- that you have answered all the questions on this form that apply to you and your partner, if you have one.

● Please tick which original documents you are sending us.

We will return all the documents to you.

We will do our best to return them to you within five working days of getting them.

Proof of service charges

Proof of ground rent or ground annual

Proof of a private or works pension or any other pension – except a State Pension paid by The Pension Service.

Proof of money coming in

● Then send your forms and documents to your nearest Pension Centre.

To find the FREEPOST address for your nearest Pension Centre, go to www.direct.gov.uk/pensions

Part 15 Ethnicity questionnaire

To help us provide all of our customers with the best possible service we would like your permission to collect information about your ethnic group and store it on our computer records. We may use this information:

- to introduce all our customers to a range of benefits and entitlements
- for use in research to ensure our services meet the needs of all customers from all communities, and
- to improve our services.

We would be grateful if you could fill in the questions on the next page.

Giving us this information is entirely voluntary and it will not affect your application. You may withdraw your consent for this information to be held at any time. We may share the information with other parts of the Department for Work and Pensions but we will not give information about you to anyone outside our department unless the law allows us to.

Part 15 Ethnicity questionnaire continued

What is your nationality?

- British
- Scottish
- English
- Welsh
- Irish
- Other Please tell us your nationality

Which ethnic background do you feel you belong to?

- White
- Mixed ethnic background
- Asian and white
- Black african and white
- Black caribbean and white
- Other mixed ethnic background Please tell us the ethnic background you feel you belong to

- Asian
- Bangladeshi
- Indian
- Pakistani
- Other Asian background Please tell us the ethnic background you feel you belong to

- Black
- African
- Caribbean
- Other Black background Please tell us the ethnic background you feel you belong to

- Any Chinese background
- Other ethnic background Please tell us the ethnic background you feel you belong to

- Prefer not to say