



We have many ways we can communicate with you

If you would like braille, British Sign Language, a hearing loop, translations, large print, audio or something else please call us on **0800 99 1234** or textphone **0800 169 0133** and tell us which you need.

If you live in Wales and want this form in Welsh call **0800 99 1234**.

Calls to 0800 numbers are free from personal mobiles and landlines.

Treating people fairly

We are committed to the Equality Act 2010 and treating people fairly. To find out more about this law, search 'Equality' on www.gov.uk

About this form

Please fill in this form if your money, savings and investments add up to **more than £10,000**. We need this information to work out your Pension Credit.

Answer the questions on this form and then read and sign the **declaration**. You will need to provide documents to prove the amount of money, savings or investments you have. Please return this form with your Pension Credit application form.

Help with your application and the documents we need

If you need help to fill in this form you can:

- phone The Pension Credit claim line on **0800 99 1234**
- ask a friend or advice centre to help you.

If you cannot fill in the form because you do not have the information, or you cannot provide us with the documents we have asked for, please contact us as soon as possible.

If you are worried about sending us original documents, you can send them by recorded delivery or by registered post.

The proof you need to send us

The documents 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

Your details

<p>01 Title For example: Mr, Mrs, Miss, Ms or other.</p>	<p>06 A phone number we can contact you on</p>
<p>02 First name</p>	<p>07 National Insurance (NI) number</p> <p>You can get this from your payslips, National Insurance number card, tax papers or letters about social security benefits and entitlements.</p>
<p>03 Middle names, if you have any</p>	
<p>04 Last name</p>	
<p>05 Your permanent address</p> <p>Postcode</p>	

About money you have, including savings and investments

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, savings and investments also.

08 Money in a bank current account £	Certificate issue number
09 Money in any other bank account £	Number of units held
10 Money in a building society current account £	<u>If you need to tell us about more than two National Savings Certificates, use the space at question 31.</u>
11 Money in any other building society account £	15 Premium Bonds £
12 Money in a Post Office® account £	16 Income bonds or capital bonds £
13 Cash saved for something £	17 Unit trusts, ISAs, PEPs, TOISAs or other investments £
14 National Savings Certificates National Savings Certificate 1 £ Certificate issue number Number of units held National Savings Certificate 2 £	18 Money or property held in trust £
	19 Shares Shares 1 Approximate value £ Name of the company the shares are held in Number of shares held

Share type

For example, ordinary shares, B shares or preference shares.

Shares 2

Approximate value

£

Name of the company the shares are held in

Number of shares held

Share type

For example, ordinary shares, B shares or preference shares.

Shares 3

Approximate value

£

Name of the company the shares are held in

Number of shares held

Share type

For example, ordinary shares, B shares or preference shares.

If you need to tell us about more than three types of shares, use the space at question 31.

20 Any other money or investments

£

Type of other money or investment

21 Total savings and investments

£

More about your savings and investments

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.

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

£

When did you get this?

DD/MM/YYYY

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

£

When did you get this?

DD/MM/YYYY

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

£

When did you get this?

DD/MM/YYYY

25 A Social Fund payment or arrears of:

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

£

When did you get this?

DD/MM/YYYY

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

No **Go to question 27**

Yes

If **Yes**, how much did you get?

£

Is this held in trust?

No

Yes

27 Have you or your partner had a payment from the vCJD, MacFarlane, Eileen or Skipton Trusts, or London Bombings Relief Charitable Fund?

No

Yes

If **Yes**, how much did you get?

£

When did you get this?

DD/MM/YYYY

If you need to tell us about more than one payment, use the space at question 31.

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

No

Yes

If **Yes**, how much did you get?

£

29 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

If **Yes**, how much did you get?

£

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

No

Yes

If **Yes**, how much did you get?

£

Any further information

31 Tell us anything else you think we should know

If the date you are applying from is in the past, use this space to tell us if the details have changed since that date and when they changed.

If you need to 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.

Declaration

Please read and sign:

- **I understand** that if I knowingly give information that is incorrect or incomplete, my benefit may be stopped and I may be liable to prosecution or other action.
- **I declare** that the information I have given on this form is correct and complete as far as I know and believe and I have included all my income and savings.

Your signature

Date

DD/MM/YYYY

How DWP collects and uses information

When we collect information about you we may use it for any of our purposes.

These include:

- social security benefits and allowances
- child maintenance
- employment and training
- investigating and prosecuting tax credits offences
- private pensions policy and
- retirement planning.

We may get information about you from other parties for any of our purposes as the law allows to check the information you provide and improve our services. We may give information about you to other organisations as the law allows, for example to protect against crime.

To find out more about our purposes, how we use personal information for those purposes and your information rights, including how to request a copy of your information, please visit www.gov.uk/dwp/personal-information-charter