

Isle of Wight Citizens Advice Bureau

Charity number 1050217 Company number 3116361



Exchange House
St Cross Lane
Newport
Isle of Wight
PO30 5BZ



Administration: 01983 559903
Advice Line: 08444 111 444

debtenquiries@iwcab.org.uk

The Money Advice Unit Self Referral

You have requested advice from the Money Advice Unit. In order to help it is important that we know all relevant information regarding your situation including information on your debts, income and expenditure.

Attached is our self referral pack.

The pack needs to be fully completed & returned to us either in the post at the above address or brought to your appointment

If you are returning this form by post, please ensure that you apply the correct postage otherwise it will not reach us. It is advisable to have this weighed at the Post Office as a standard first or second class stamp may not be enough.

When your referral form has been processed you will be contacted by the Money Advice Unit to discuss the options and debt solutions available to you.

It is important that you provide us with contact telephone numbers and state clearly whether or not messages can be left.

PLEASE INCLUDE DETAILS OF YOUR INCOME AND EXPENDITURE
WHEN YOU RETURN THIS PACK

This could be;

- **A Wage Slip**
- **A Bank Statement**
- **A Benefit Award Notice**

The Money Advice Unit is unable to offer or manage long term Debt Management Plans.

Please keep a copy of this front sheet for your information

The Isle of Wight Citizens is an Independent Charity supported by:



An Equal Opportunities employer



Money Advice Self Referral

Surname: _____ **Surname:** _____

Forenames: _____ **Forenames:** _____

Date of Birth: ____/____/____ **Date of Birth:** ____/____/____

Nat. Ins No. _____ **Nat. Ins No.** _____

Address: _____ **Telephone:** _____

_____ **Mobile:** _____

_____ **Email:** _____

Postcode _____ **Can we leave messages Yes / No**

Martial Status Married Cohabiting Civil partnership Single Widow Separated Divorced
 Please circle

Number of dependant children: _____ Ages: _____ Any Non-dependant Adults/children

Housing Status Owner Occupier Shared Ownership Rented, Private or Housing Association Living with family No fixed abode Other
 (please circle)

Employment Status Full Time Part Time Unemployed Home Carer Retired Sick Student Seasonal Self Employed
 (please circle)

PRIORITY DEBTS - The following debts are classed as priorities if you have arrears on the accounts:-

Mortgage Secured Loan Rent Council Tax Gas Electric Income Tax CSA Arrears Magistrates Court Fine

NON-PRIORITY DEBTS - The following debts are classed as non priorities if you have arrears on the accounts:-

Water Personal Loan Catalogues Bank Overdraft Credit Card Store cards Benefit Overpayment Hire Purchase Telephone

Old Fuel Supplier Other

Please make a full list of your creditors on the sheet provided with this form and please advise us if you are disputing any of your debts or any of the following action has been taken:-

Court Action (such as County Court Judgement (CCJ) / Charging Order / Fines etc)

Bailiff Action



INCOME DETAILS

How much is your take home pay each month

How much is your partners take home pay each month

Do you receive any other income, including State benefits or Tax credits

Yes No

IF YES, state the source in the box below (for example pension, pension, state benefits—name of benefit, part-time earnings, child benefit etc) and how much you receive each month

How much do other members of your households contribute each moth. (such as non-dependants / lodgers etc)

The Total Monthly Income of the Household

If any of your payments are made weekly use the following calculation

- To find the monthly figure : take weekly figure x 52 ÷ by 12
- Quarterly figures: take the 1/4 figure x 4 ÷ by 12
- For Annual figures: Annual figures ÷ by 12

OUTGOINGS

The information provided in this section may be used to work out how much, if anything, you can afford to pay your creditors each month. It is important that it is accurate and that you include **ALL** necessary expenditure

How much do you spend on the following each month:-

MORTGAGE PAYMENTS OR RENT ON YOUR HOME	£ <input type="text"/>
HOUSEKEEPING, INCLUDING FOOD & CLEANING	£ <input type="text"/>
GAS	£ <input type="text"/>
ELECTRICITY	£ <input type="text"/>
WATER	£ <input type="text"/>
HOME TELEPHONE	£ <input type="text"/>
MOBILE TELEPHONE	£ <input type="text"/>
TRAVELLING EXPENSES	£ <input type="text"/>
MAINTENANCE PAYMENTS & FINES	£ <input type="text"/>
COUNCIL TAX	£ <input type="text"/>
TV LICENCE	£ <input type="text"/>
* OTHER ESSENTIAL PAYMENTS (e.g life/household Insurance etc)	£ <input type="text"/>
TOTAL MONTHLY EXPENDITURE	£ <input type="text"/>

*** OTHER EXPENDITURE BREAKDOWN—details and monthly amounts:-**

Face to Face Debt Advice Project DATA PROTECTION DECLARATION

We, the Isle of Wight Citizens Advice Bureau, working with The Money Advice Service (MAS), will process your personal data according to the Data Protection Act 1998. If you do not want your personal information to be used, you can still receive free advice.

The information you give may be:

- Added to an anonymous and confidential database;
- Passed to a research organisation, to evaluate this project;
- Used by MAS to create statistics, performance reports, or evaluations.

I agree that my personal information can be used in these ways and understand that MAS may contact me for an evaluation purposes:

Yes

No

Please sign here, to confirm your agreement to this request:

Print Name: _____

Signature: _____

Date: _____