

**THE SOCIETY FOR RELIEF OF WIDOWS AND ORPHANS OF MEDICAL MEN**

**FORM W&O/A4 APPLICATION FOR FINANCIAL ASSISTANCE**

**Particulars common to all applicants for financial assistance**

**Reason for request for financial assistance:**

(If a Student, please give details of course being studied and the date of completion/qualification)

.....  
.....

**PERSONAL FINANCIAL DETAILS**

**Accommodation**

Do you own your own residence?.....

What type of property is it?.....

If owned, what is the current resale value?.....

Do you have a mortgage?.....

    If so, capital sum outstanding:.....

    Annual repayment:.....

If rented, please give details of rental terms.....

.....

**Assets – Please give details of all assets and all accounts held**

**Savings** (e.g. Bank, Building Society, National Savings, PEPs, ISAs, etc.)

    Capital Sum(s).....

    Annual Interest (gross/net).....

**Stocks & Shares**

    Capital Value.....

    Annual/dividend income (gross/net).....

*If necessary provide details on a separate piece of paper*

**Motor Vehicle(s)** - (Insured value).....

Vehicle 1.....

Vehicle 2.....

**Do you have a holiday home or timeshare?**

**Yes/No.....Value.....**

**Any other assets? (Please give details)**

Value.....

**Other Funds**

Are there any other funds eg Insurance Policies, Family Trust, Children’s Trust Funds which are, or may become available?

Please give details.....

**Debts**

Do you owe any money? (e.g. Student loans, Bank loans, credit card debts, hire purchase debts etc.)

How much is owed?.....

To whom is it owed?.....

Do you have an overdraft?.....

If so, for what sum?.....

**Anticipated expenses**

Are there expenses (whether capital or ongoing) which you expect to arise in the foreseeable future? If so, please give details.

What are the expenses?

How much are they likely to be?

Are any of the Income or Expenditure figures given on the attached sheets likely to increase or decrease substantially within the next six months?...

**Have you applied to any other charities for similar assistance?**

If yes:When?.....

Which one (s)?.....

With what result?.....

Are you in agreement for us to liaise with them if necessary?.....

**Any other relevant information which you wish us to consider?**

**Anything Else?**

Is there anything else which you feel we should know but which is not covered above?

If so, please provide details on another sheet.

**Please give the names and addresses of at least two referees** who we may contact for further details, at least one of whom should be a medical practitioner.

- 1.
- 2.

**With your application would you please send copies of as many as possible of the following:-**

The last three months bank statement(s) for all accounts held, including Building Societies

The most recent credit card statement(s)

Mortgage Statements/ or copy of rental agreement

Confirmation of State Benefits

The most recent utility bills

Council Tax Bill

Inland Revenue Form P60

Last Income Tax Return or Tax Coding

Last practice accounts (audited, as supplied to Inland Revenue) if relevant

Capital Assets valuation schedules

Curriculum Vitae

Confirmation of place at College/University

Also would you please include a covering letter explaining the current situation and how it has arisen.

The Data Protection Act 1998 obliges us to notify you that we shall be holding data on you. We need the information on the application form, and any additional information we may request, in order to process your application for assistance. We may also need to share information with any other Charities to which you might apply. To do so lawfully, we need you to sign at the foot of this form that you consent to the information you provide being held and used for these purposes.

**DECLARATION BY APPLICANT FOR FINANCIAL ASSISTANCE**

I declare that the particulars given on this form, and the accompanying income and expenditure statements, are a true statement of my circumstances, and I give my consent to the information provided being held and used for the purposes described above.

*Signature of applicant.....date.....*