

Benefit Entitlement Check Appointment – Check list to bring with you



	Client	Partner	How often is this paid? ie weekly/4 weekly/ monthly
National Insurance Number			
Benefits	Please bring copies of award letters if have them		
	Amount:	Amount:	
State Pension			
Attendance Allowance			
Disability Living Allowance Care Component			
Disability Living Allowance Mobility Component			
Personal Independence Payment Daily Living			
Personal Independence Payment Mobility			
Any other benefits			
Occupational Pension (please bring pay slip or P60)			
Private Pension (please bring pay slip / P60)			
Any Earnings from Work			
Any other income			
Savings and Investments	Please bring last 3 months statements for all accounts		
Current Account			
Savings Account			
ISA			
Premium Bonds			
Any other savings			
Housing			
Do you own your property	Yes/No	Yes/No	
Amount outstanding mortgage or equity release			
How much is your rent			
Name of Landlord (bring tenancy)			
Council Tax band (bring latest bill)			
Does anyone hold Power of Attorney for you?			