



## Checklist for Benefits Review

According to 'entitledto', their 2022 annual review suggests **about £15 billion** of benefits remain unclaimed each year, at PFC, we want to ensure we can help fill that gap for you.

To check your benefit entitlement, the following information will be helpful, along with any documentation you might have in support:

[enquiries@paladinfinancialconsultancy.com](mailto:enquiries@paladinfinancialconsultancy.com)

### Personal details

Name		
Address		
Postcode		
Phone No.	Mobile No.	Landline No.
Email address		
Contact details of person incase of emergency		
Name		
Phone No.	Mobile No.	Landline No.
Email address		
Postcode		

**Household details**

Are you single or living with someone as a couple	
How many children do you receive Child Benefit for	
How old are the children	
How many non dependants live with you (grown-up children, other adult such as parent)	
How old are the non-dependants	
How many lodgers/boarders live with you	

**Personal circumstances**

Has anything in the household changed recently?

New baby	
Child started or left school	
Partner moved in or left	
Bereavement	
New job or job loss	
Illness or disability	
Other	

If someone in the household is ill or disabled:

Who is ill or disabled	
Do they need help with personal care or mobility	

**Details of household income**

What state benefits or tax credits are you, your partner, or non-dependent already getting? (eg Child Benefit, Housing Benefit, Universal Credit, PIP)

Who	Benefit	Amount (weekly or monthly)

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Is anything being deducted from your benefits? (eg repay a Social Fund loan)

If yes, how much and what for	
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Are you, your partner or non-dependent working?

	You	Partner	Non-dependent
How many jobs			
How many hours			
Gross income (before tax)			

Have you or your partner started or left a job in the last 12 months?

	Started	Left
If yes, what were the start and leave dates		

Do you or your partner pay into an occupational or private pension?

	You	Partner
If yes, how much		

Do you or your partner get an occupational pension?

	You	Partner
If yes, how much		

Do you or your partner have an income from savings or investments eg interest on a savings account?

If yes, how much	
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Do you have any income from lodgers/boarders?

If yes, how much	
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### Capital (savings)

Do you or your partner have any savings, investments or other capital? eg in a savings account, savings bonds, ISAs, shares, a property you don't live in

If yes, how much in total	
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**Housing**

What is your housing status?

Owner (state if owned outright or mortgaged)	
Rent	
Live with relatives	
Staying with friends	
Shared Ownership (part rent /mortgage)	
Homeless	

If you own your home:

When did you take out the mortgage	
How much are the mortgage payments	

If you rent:

Are you in social or private rented property	
How much is the rent	
Does your rent include any bills, services, meals	
Do you get any rent free weeks	

Council Tax

How much is your Council Tax (after any discounts but ignoring any Council Tax Benefit you may get)	
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**Other costs**

Do you pay for childcare whilst you are at work?

Who provides the childcare	
How much do you pay	
Does this vary during the year, eg holidays/ term time	
