



For your records

# Your financial assessment

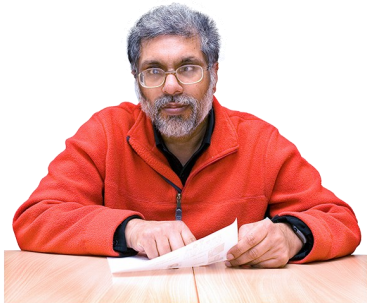
## About this booklet



**Hampshire County Council wrote this guide.**



**It tells you what will happen at your financial assessment.**



**It will help you to get ready for your assessment.**

## About your financial assessment



**We may ask you to complete an online financial assessment form. Or we may do your assessment over the phone.**



**You may want to ask a friend or a relative to help you.**



**You do not have to give us information about your finances.**



**But if you choose not to tell us then you will have to pay the full cost of your care.**

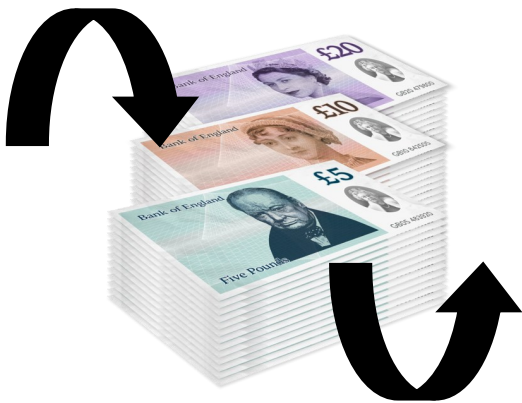


**Your financial assessment will be different depending on whether you are:**

- **Paying for care in your own home or**
- **Paying for care in a care home.**



# What happens at your financial assessment?



We will look at the money you have coming in and going out.



There is a checklist of things we will ask you about at the end of this guide. But here are some examples.



We will ask you about money you have in bank and savings accounts.



If you are going into a care home, we will ask if you rent or own your home.

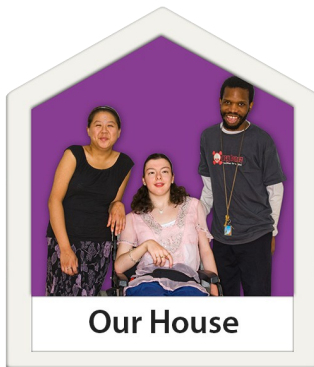


If you own your home, we also ask:

- If your home is jointly owned with anyone else.



- How much your home is worth and if you have a mortgage.



- Who lives with you.



We will ask you about the money you have coming in.



This includes benefits.



**We will not ask about money you earn from working. Earnings do not count towards the cost of your care and support.**



**Also, we do not count these but you still need to tell us about:**

- **Direct Payments.**



- **Guaranteed Income Payments (GIPs) made to veterans under the Armed Forces Compensation Scheme.**



- **The mobility component of Disability Living Allowance.**



- The mobility component of Personal Independence Payments



- Your partner's money if you will be having care in your own home.



We will ask if you buy special equipment, food or clothes because of a disability.



We will also need details of your mortgage or rent payments, and council tax.

# What happens after your assessment?



After your assessment we will write to tell you if you need to pay anything towards your care.

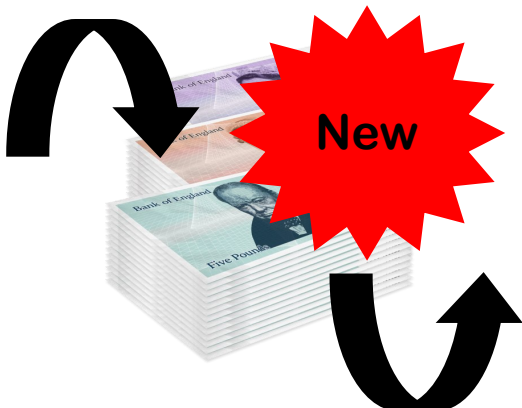


We will tell you how much you need to pay.



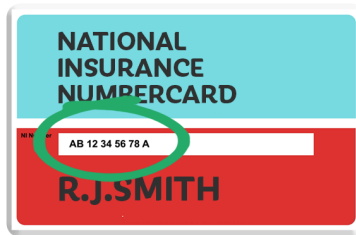
Every year we will review your financial assessment and let you know the new weekly amount.

A review is a chance to check if anything has changed.



But please tell us straight away if there are any changes to the money you have coming in and going out.

# Preparing for your financial assessment



Please tell us your National Insurance number at your financial assessment. You will find this on any benefit or tax letters, or on your payslip.



On the next page is a checklist.

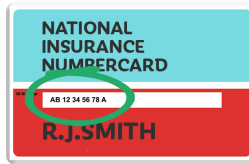


You can use it to make sure you have everything you need at your financial assessment.

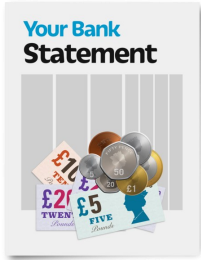


We will need to see supporting documents at your assessment.

# Checklist



Your National Insurance number



## Your savings and property

Statements for all your bank and savings accounts



National Savings books and certificates



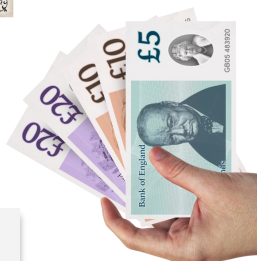
ISAs and trust funds (capital or income)



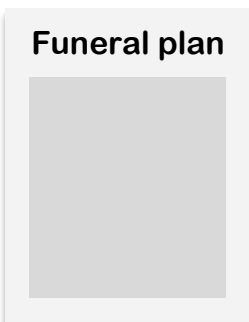
Premium Bonds



Stocks and shares certificates



Compensation payments (capital or income)



Investments, including bonds, insurance and funeral plans



Property or land that you own (but not the one you live in if you are receiving care in your own home)



Rental income from other properties (after tax)



Information about any capital or property you held before



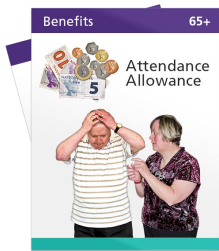
We will need to know if these are yours or shared with someone else. Only your share is taken into account.

### Money coming in



We will ask you about money coming in, including benefits.

## Benefits include:



Attendance Allowance, including Constant Attendance Allowance and Exceptionally Severe Disablement Allowance



Bereavement Allowance, known before as Widow's Pension



Carer's Allowance



Disability Living Allowances



Income Support



Industrial Injuries Disablement Benefit or equivalent benefits



Jobseeker's Allowance



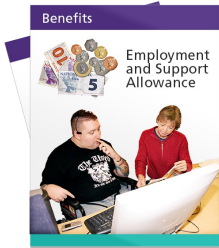
Maternity Allowance



**Pension Credit**



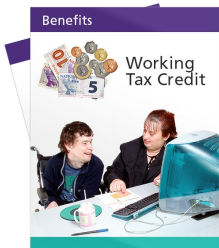
**Personal Independence Payments**



**Employment and Support Allowance**



**Universal Credit**



**Working Tax Credit**



**Pensions you get from the Department of Work and Pensions (DWP)**



**Statements or notification of any private pensions**



**Notification of any occupational pension rates**



**Annuities**

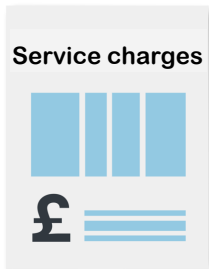
# Money going out (what you spend)



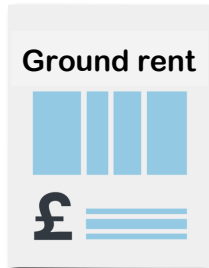
Rent



Mortgage



Service charges



Ground rent



Council tax

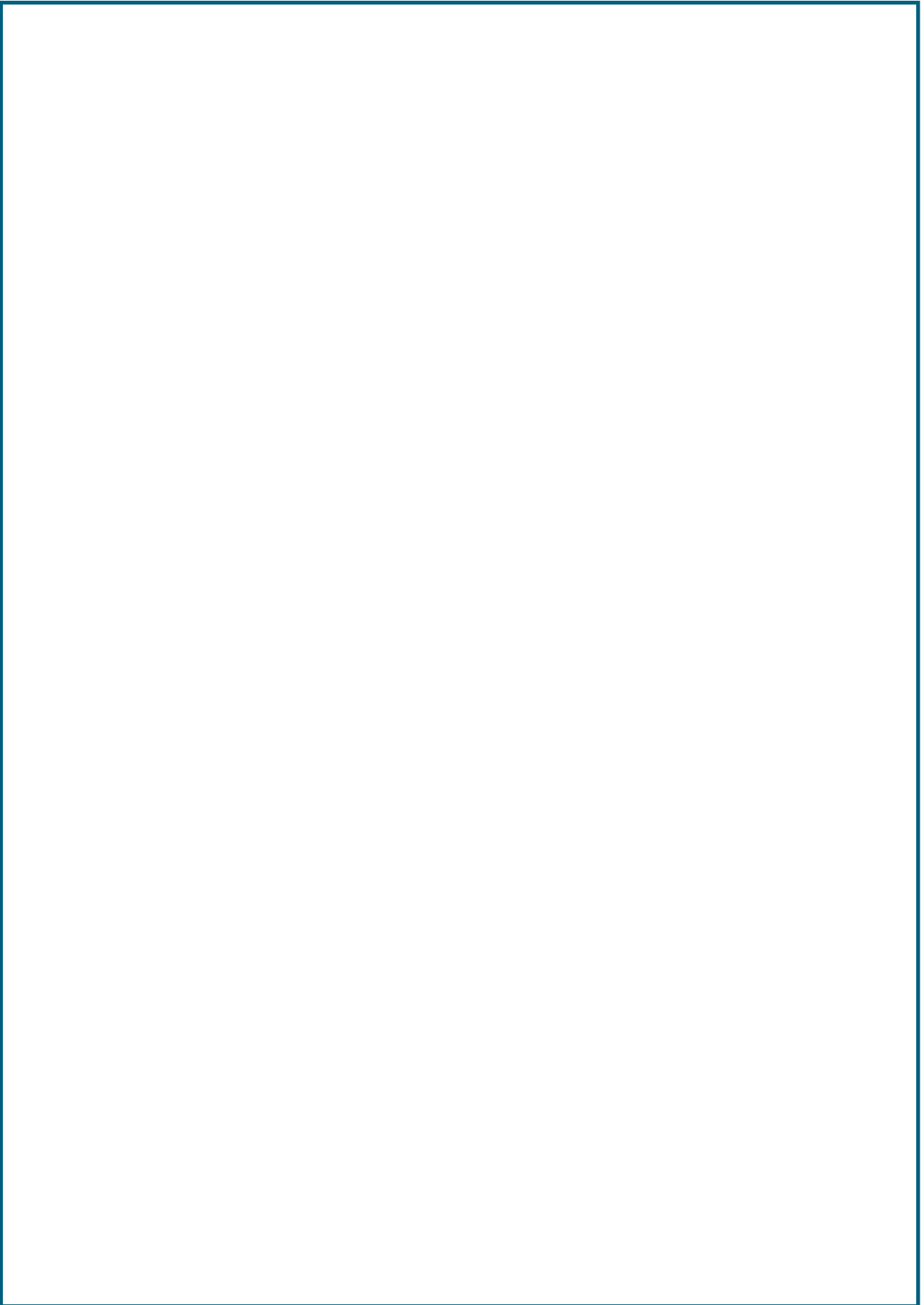


Utility bills (including telephone, water and power)



Spending related to your disability

# Notes

A large, empty rectangular box with a dark blue border, occupying most of the page below the 'Notes' header. It is intended for the user to write their notes.

**Tell us how we are doing.  
Scan the QR code on your  
phone to complete our  
survey.**



**For more information about Adults'  
Health and Care, visit:**

**[hants.gov.uk/adultsocialcare](https://hants.gov.uk/adultsocialcare)**

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