

Your application to the Boots Benevolent Fund – A complete guide

Firstly – check what the charity can and can't help with on
the following page...



Charity Criteria – i.e. what the Fund can and cannot support with and who is eligible



The Boots Benevolent Fund is a registered charity that can offer grants, interest free loans and supermarket vouchers in times of financial hardship. The charity is available to eligible current and former Boots colleagues, as well as their immediate relatives and dependents, in the UK.

What the Fund can assist with

- Utility, rent and council tax arrears
- Essential living expenses
- Funeral expenses
- Essential white goods and furniture
- Bankruptcy and debt relief order fees
- Rent and deposit if a colleague is homeless;
- Medical aids
- Car repairs in remote locations

What the Fund cannot assist with

- Mortgage arrears
- Legal fees
- Non-essential arrears e.g. TV/phone bills
- Car finance
- Childcare costs
- Overdraft, credit card loan repayments



Before you start make sure you have the following:

- ✓ Proof of your employment at Boots UK Ltd – for example your staff number, NI number or pension number.
- ✓ Your households income and details of your household costs
- ✓ Copies of your most recent bank statements
- ✓ Paperwork for anything you are applying for help with – e.g. funeral invoice, arrears statement



Section 1 of the application form – about you

In this section you will need to complete:

- Your Name
- Whether or not you are a current or former colleague
- Staff number/pension number or national insurance number - so we can identify you
- What within the charity criteria you are applying for help with.



Boots Benevolent Fund – Application Form

Fill in the form as best as you can. If you struggle please complete what you can or give us a call so we can talk you through. Our contact details are at the bottom of the form.

Section 1 - You and Your Application – Tell us why you are applying to the Fund			
<i>Life works only</i>			
Life Works Case Reference Number:	<input type="text"/>	Date Received by LifeWorks:	<input type="text"/>
Life Works Consultant	<input type="text"/>		
Name	<input type="text"/>	Current/Former?	<input type="text"/>
Current Employee - please provide Staff Number	<input type="text"/>		
Former Employee - please provide either Staff Number / Pension Number / National Insurance number	<input type="text"/>		
Reason assistance is required. What within the Charity Criteria are you applying for help with? See "Charity Criteria" document if you are not sure what this is. (Please provide as much detail as possible)			
<input type="text"/>			



Section 2 of the application form – income and spend

In this section you will need to complete:

- Your household income
- What you spend on housing, utilities and food.
- You will need to provide a bank statement to verify your income and outgoings.
- If you have more than one bank account you will need to provide that too.

Section 2 – Income and Spend
To assess your application we need to know the complete households income and spend information.

Record all income as monthly figures			
Income (Monthly)	Applicant	Spouse	Total (Combined)
Take Home Pay (net)	£	£	£ -
Child Maintenance	£	£	£ -
Pension(s)	£	£	£ -
Benefits (please state which)			
	£	£	£ -
	£	£	£ -
Company/Statutory Sick Pay	£	£	£ -
Other Income – e.g. from family or charity	£	£	£ -
Total Income	£	£	£ -

Record all spend as monthly figures				For LifeWorks Use
Spend (Monthly)	Applicant	Spouse	Total (Combined)	
Rent/Ground Rent/ Mortgage	£	£	£ -	
Water	£	£	£ -	
Gas/Electric/Oil	£	£	£ -	
Council Tax	£	£	£ -	
Vehicle & Travel Costs (incl insurance, road tax, servicing, fuel, parking, public transport)	£	£	£ -	
Telephone incl Mobile(s)	£	£	£ -	
TV Package/TV License/Broadband/Line Rental	£	£	£ -	
Healthcare incl prescription's/optics/dental	£	£	£ -	
Child Maintenance	£	£	£ -	
Insurance (e.g. building/contents/health)	£	£	£ -	
Childcare	£	£	£ -	
Clothing & Footwear	£	£	£ -	
Smoking	£	£	£ -	
Food and Household (including school meals and work meals)	£	£	£ -	
Other e.g. pet costs, leisure, hairdressing, credit cards, hire purchase, loans etc. Please state which.	£	£	£ -	
	£	£	£ -	
	£	£	£ -	
	£	£	£ -	

You will also need to confirm:

- Who lives in the household
- If you have any savings
- Any outstanding debts and arrear and whether or not you have explored payment plans for them.

Please note: for any arrears that you require help with please ensure the Fund has permission to speak to the company directly to confirm up to date arrears. This is usually just a phone call to the company to confirm you are happy for them to speak to us.

Please provide details of anyone that currently lives in your property with you:					
Name	Relationship	Age	Do they contribute financially to the household?		Are they dependent on you financially?
Is there anyone who doesn't live with you who is financially dependent on you?					
Do you or your partner have any savings/shares/bonds? (tick relevant box)	No		Yes		If so how much in Total?
					£0.00
Arrears – please list all outstanding debts/arrears					
Arrears	Outstanding Arrears	What payments are you currently making? (monthly)	Have you requested a payment plan for these arrears?		
Rent Arrears	£	£			
Gas/Electric Arrears	£	£			
Council Tax Arrears	£	£			
Water Arrears	£	£			
Total	£ -	£ -			
Do you have any other arrears/debts?* - Other debts may include loans, credit cards, overdraft, car finance, hire purchase contracts, phone bills etc. If yes then please state which:					
<input type="text"/>					
*As these are outside of the Charity Criteria please speak to LifeWorks about other support available.					
IMPORTANT - if you haven't contacted your creditors to request an affordable payment plan please contact them prior to application. Please tick this box to confirm you have done this. <input type="checkbox"/>					
ACCOUNT HOLDERS PERMISSION - for any arrears that you are requesting help with, please ensure the Fund has permission to speak to them directly to confirm up to date arrears amounts and to arrange payment (if applicable). This is usually just a phone call to the company to state that you are happy for them to discuss your arrears with the Boots Benevolent Fund. Please tick this box to confirm you have done this: <input type="checkbox"/>					

Section 3 – what happens next

In this section you need to tell us:

- Your contact details
- You can ignore the section relating to your line manager as this is for current colleagues only

Section 3 – What happens next?	
We will contact you to discuss your application. If we cannot contact you within 21 days your application will be closed. Your application is confidential. We will only contact your line manager if you give permission (current colleagues only).	
Home Address:	<input type="text"/>
Phone Number:	<input type="text"/>
Email Address:	<input type="text"/>
Best time(s)/method to contact you:	<input type="text"/>
Current Colleagues only	
Permission to contact Line Manager:	<input type="checkbox"/>
Line Manager name:	<input type="text"/>
Line Manager email:	<input type="text"/>
Line Manager tel no:	<input type="text"/>
Best time(s)/method to contact Line Manager:	<input type="text"/>

Supporting documents

<u>Applying for help with:</u>	<u>You will need to provide this with your application:</u>
Essential Living expenses	Your most recent bank statement/s to verify your income and outgoings. If you have more than one bank account you will need to provide those too. For shared accounts please provide written permission from the joint account holder for us to see these.
Utility/council tax arrears	Most recent arrears documents (not bills due to be paid).
Rental arrears	Arrears statement with a breakdown on when payments were missed.
1st month's rent/deposit	A copy of the tenancy agreement/inventory should be supplied along with the outstanding balance. Please note the Fund cannot support with admin costs/fees.
Essential white goods /furniture	A copy of the tenancy agreement/inventory if applicable.
Funeral Expenses	Invoice of funeral costs with breakdown of outstanding balance. Please also provide details of any insurance payments, family and friend contributions or payment plans.
Travel costs to a funeral	Invoice detailing travel information, costs and applicant's name. Please also provide proof of the date of the funeral, e.g. a copy of the invitation/obituary.
Medical Aids/Equipment	Confirmation from a health professional the medical aid/equipment is required.
Bankruptcy and Debt Relief Order Fees	Detailed debt management recommendation including actual costs from StepChange or other non-fee charging debt management body.
Car repairs in remote location	Invoice detailing car repair costs and outstanding balance

Section 4 – checks and declarations

Finally you just need to confirm:

- Check that you have provided the correct supporting documents
- Sign the declaration
- Post the form to us!

The Fund aims to get you a decision within 21 days. However it may take longer if you do not provide the correct documents.

Section 4 – Checks and Declaration	
Check that you have included relevant documents with your application, sign it and send it to us.	
Please ensure you provide the following supporting documentation with your application.	
Bank Statements - Please provide a copy of the last full months bank statement(s) so the Fund is able to verify your monthly spend listed in section 2. e.g. If you are applying in August, please send a bank statement dated 1 July to 31 July. Please note that if you have more than one bank account we will need to see statements for those as well for the same time period. If any of the accounts are joint accounts please ensure you have permission from the other account holder to send us these documents. By signing the below declaration you confirm that permission has been obtained.	
Former Colleagues – Please provide proof of employment by Boots e.g. a payslip, employment contract, pension statement or tax statement.	
Other Supporting Documents - e.g. copies of arrears documents, funeral invoice. Please check the "Charity Criteria" document to ensure you provide the correct supporting documents. If you do not provide the correct support documents your application will be delayed. Please do not send originals as they cannot be returned. Please send the most recent documents you have, ideally dated in the last 30 days.	
Signed Declaration:	
<i>I give my consent to the sharing of the enclosed information with Lifeworks and selected departments in Boots, to assess my application to the Boots Benevolent Fund and for reporting purposes. I understand that if I am found to be misusing the Fund this will be investigated and disciplinary action may be taken. Whilst my application is being processed I agree to continue to abide by the Boots Code of Conduct. Access to the Fund may be withdrawn without notice at the discretion of the Boots Benevolent Fund, if my conduct falls below the required standards. Checks will be made to verify the data provided is accurate.</i>	
Print name:	<input type="text"/>
Signature:	<input type="text"/>
Date:	<input type="text"/>
<i>To help spread the word about the Boots Benevolent Fund we may wish to use your story in our promotional material. Your name and any identifying details will be changed to protect your confidentiality. If you would prefer for us not to use your details in this way please put a X in the box</i>	
<input type="checkbox"/>	
How did you hear about the Boots Benevolent Fund?	
<input type="text"/>	

Simply pop it in the post to us at the following address:

FREEPOST CASS TEAM

That is the whole address, it will get to us – don't worry!

Or email it to us at

bbf@boots.co.uk

*Or former colleagues can speak to the Fund on
0844 241 25910*