**The Institute of Financial Accountants &**

**The International Association of Book-keepers**

**BENEVOLENT FUND**

**Registered Charity No: 234082**

Date

**Please answer all questions and write CLEARLY**

|  |  |  |
| --- | --- | --- |
| **Surname** | | |
| **Forename(s)** | | |
| **Full Postal Address** | | |
| **Telephone no:** | **Marital Status** | **Date of Birth:** |

**Please list below all dependants in your household**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Relationship**  (please give age if under 16) | | **Employment or Education status at present time** |
|  |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
| **Membership No:**  **IFA / IAB**  **(please delete as appropriate)** | | **Date Joined:** | |
| **IFA / IAB Subscription paid to**  **date:** (day/month/year)**:** | | **Amount of Grant Applied for:**  (specify your local currency) | |

**Please give your employment details**

|  |  |  |  |
| --- | --- | --- | --- |
| **From** | **To** | **Position Held** | **Annual Earnings** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Please give below the income & expenditure for the whole household**

|  |  |
| --- | --- |
| **Currency of your income:** | |
| **Total income for past 12 months** | **Total outgoings for past 12 months** |
| Self - Salary nett  Partner - Salary nett |  |
|  | Mortgages / Rent / Insurances |
|  | Clothing |
|  | Repairs & Maintenance |
|  | Housekeeping/Food |
|  | Rates/Council Tax / Water |
|  | Heating |
|  | Travel – bus & train |
| Self - Rental Income gross      Partner - Rental income gross | Less rental income expenses:  Mortgage  Agent  Repairs  Heating  Water  Other |
| Other Income NET - please specify | Other outgoings (please specify) |
|  |  |
| Total | Total |
| **Expected income for next 12 months** | **Total outgoings for next 12 months** |
| Self - Salary nett  Partner - Salary nett |  |
|  | Mortgages / Rent / Insurances |
|  | Clothing |
|  | Repairs & Maintenance |
|  | Housekeeping/Food |
|  | Rates/Council Tax / Water |

|  |  |
| --- | --- |
|  | Heating |
|  | Travel – bus & train |
| Self - Rental Income Gross  Partner – Rental income Gross: | Less rental income expenses:  Mortgage  Agent  Repairs  Heating  Water  Other |
| Other Income NET - please specify | Other outgoings (please specify) |
|  |  |
| **Total** | **Total** |

**NB:** Your income and expenditure should be evidenced as fully as possible with bank statements, pay slips, tax return forms, proof of rent/mortgage payments, or any other papers you think may help the Trustees in reaching their decision.

|  |
| --- |
| **Reasons for Application:** continue on separate sheet if necessary. |

|  |
| --- |
| **Any other comments:** (continue overleaf if necessary) |
| **I have not applied for assistance to any other charity YES / NO** |

Signed

Date

|  |
| --- |
| **Witnessed by**: Name: ……………………………………………….  Address: …………………………………………………………………………………………………….  (this person must **not** be a relative of the applicant)  Signed: …………………………………..……….. Date ………………………………..…………….. |

**Please return this form to the following address:**

c/o The Secretary, The IFA & IAB Benevolent Fund,

23 Nutbourne Road, Farlington, Portsmouth PO6 1NP