

NAME OF APPLICANT

HOME (office use only)



APPLICATION FORM - PART 2 (FINANCE)

Temporary or Permanent residence in an RMBI Home

IMPORTANT INFORMATION

This form is to be completed when Part 1 (General) has been processed by the Home Manager.

This form must be completed before residency commences.

If you need any help or advice completing this form, contact the Home Manager at your first choice Home.

Royal Masonic Benevolent Institution

Caring for older Freemasons and their dependants for over 160 years

Financial Information

In order to help us process your application, please provide us with full information regarding your property, income and capital/savings by completing the applicable questions.

Once an application is made, a potential resident must not dispose of any property, assets or capital, or purchase an annuity, without discussing this with the RMBI.

A. About you

Your surname:

Your forename/s:

Your date of birth:

Your home address:

Post Code:

Do you usually deal with your own finances? YES NO

If no, please provide the name and address of the person who does this for you

Name::

Address:

Post Code:

Telephone No.

His/her relationship to you

If you have an appointed power of attorney, please give details:

B. Your property

Do you fully own your own home? YES NO Present value: £

Do you part own your home? YES NO Present value: £

Part ownership, please give details of other parties

Should your home be occupied please tick the relevant box

A partner A relative who is aged over 60 years A relative who is incapacitated

A child under 16 years whom you support

A separated partner who is a lone parent of a child under 16 years

Other (please specify)

If you have a life interest or part share, documentary evidence must accompany this application

Address of property

Post Code

Details

Do you own any additional properties? Please provide details

C. Your income (please state income after Income Tax Deductions)	Weekly	Monthly
State retirement pension (as quoted in Pension Book)	£	£
Minimum Income Guarantee/Pension (Income Support)	£	£
Benefits under the War Pensions Scheme	£	£
Benefits under the Industrial Injuries Scheme	£	£
Carer's Allowance	£	£
Invalid Care Allowance	£	£
Severe Disablement Allowance	£	£
Incapacity Benefit	£	£
Disability Living Allowance	£	£
Attendance Allowance	£	£
Bereavement or Widow's Benefits	£	£
Other Pensions or Superannuation Payments (<i>please give details</i>)		
Employers Pension		
Private Annuities	£	£
RMBI Annuity (for sheltered accommodation only)	£	£
Trust Funds (<i>please provide full details and supply documentary evidence</i>)		
■	£	£
■	£	£
Rents received from any properties	£	£
Any other income	£	£
<i>Do not enter income from capital resources such as stocks, shares or capital bonds</i>		

D. Your savings (include a separate page if necessary)	Present balance
Current Account(s)	£
	£

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Deposit Account(s)	£
	£
Building Societies (please list names as applicable)	£
■	£
■	£
Premium Bonds	£
Savings Certificates	£

Investments (including ISAs etc)
(Please supply Company name, number of shares and value at time of completion)

	Number of shares	Value
■		
■		

Did you fill in this form yourself? YES NO

If no, please give details of the person who completed the form

Name: _____

Address: _____

Post Code: _____

Telephone number: _____

Relationship to you: _____

E. DECLARATION

The information on this form is correct to the best of my knowledge. If applying for temporary residence, I declare that I will vacate the accommodation on the date stated. If my temporary residence exceeds stated dates I will undertake to sign a contract as a permanent resident.

Signature: _____

Print name: _____ Date: _____

Address: _____

Post Code: _____

Witnessed by: _____

Signature: _____

Print name: _____ Date: _____

Address: _____

Post Code: _____

Once completed, this form should be returned to the appropriate Home Manager

ROYAL MASONIC BENEVOLENT INSTITUTION

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