# Guidance Notes
# How to complete this Application Form

## Section 1 guidance

- You must send us the following documents so that we can verify your identity:

| Evidence required | Guidance notes |
|---|---|
| Proof of address | **ONE OF THE FOLLOWING:**<br>• Bank statement<br>• Utility bill (i.e. gas, water or electricity)<br>• Correspondence from HM Revenue & Customs<br><br>**MUST** not be more than three months old and must show your name and residential address. |
| Evidence of Power of Attorney | This is **ONLY** required if you are completing this application form on behalf of the Applicant under active Power of Attorney. |

- Please enclose **copies** of the above documents when you submit your application. **DO NOT** send originals, as we cannot guarantee that these will be returned to you.

## Section 2 guidance

- You must send us documents that provide evidence of your association with bp:

| Status number from adjacent list | Acceptable evidence |
|---|---|
| Status 1: | A copy of your most recent payslip and (if applicable) your last payslip in which your annual bonus was paid. |
| Status 2: | No additional evidence required; we will verify your status from your bank statements (see section 5 below). |
| Status 3: | A copy of your last annual bp pension statement (available on pensionline). |
| Status 4: | A copy of a bp P60 or P45 or payslip or any other evidence you have showing that you worked for bp. |
| Status 5: | If you are in receipt of a bp pension as a dependent of a deceased bp employee, no additional evidence is required as we will verify your status from your bank statements (see section 5 below). In all other cases, please provide any documentation you have to show that your relative was a bp employee during their lifetime (e.g. a pension statement, payslip or bank statement showing their bp salary) and to explain how you were their dependent. |

## Section 3 guidance

- Please complete the table to tell us about ownership of your home and who lives with you in your home.
- There is space at the bottom of this section for you to tell us anything about your household that you think is relevant to your application. Examples of additional information you might wish to tell us about:
  - Disabled dependents
  - Any tenants or family members who live with you and make financial contributions to the cost of running your home
  - Care costs

## Section 4 guidance

- Please complete the table to tell us why you are applying for a grant and how much you are requesting.
- You may request **either** a financial hardship grant or a specific grant amount for a particular purpose. Please **only tick one option** and if you wish to request a grant for a specific purpose, list only one grant request. If you list more than one item, we will need to write to you to ask you to choose which grant request you wish to progress, which will delay the processing of your application.
- **IMPORTANT: If you have received a grant from bp Helios Fund within the last 12 months, your application will not be successful. Please wait until at least 12 months from the date you received your grant before applying again.**
- Examples of grants that we have previously approved are listed below:
  - Stairlift
  - Accessible bathroom
  - Other accessibility equipment / household adaptations
  - Mobility scooter
  - Wheelchair
  - Lift/recliner chair or bed
  - New boiler or other heating equipment
  - New white goods
  - New household furniture item(s)
  - Household repairs
  - Double glazing – windows and/or doors
  - Medical treatment or dental costs (not covered by NHS)
  - Other medical costs where NHS provision is limited or long waiting times for treatment
  - Funeral costs

## Section 4 guidance continued

**Occupational Therapist assessments**

- For a **mobility-related** grant request, we need you to be assessed by an Occupational Therapist to ensure that the item requested is suitable and appropriate for your needs.
- **If you already have a Report from an Occupational Therapist**, please provide details of the Occupational Therapist who completed your assessment and enclose a copy of their Report when you submit your application.
- **If you do not yet have a Report from an Occupational Therapist**, write "No" in response to the question and we will provide you with guidance on how to arrange one once we have checked and confirmed that you are eligible to apply for a grant.
- You can find an Occupational Therapist local to you, using the Royal College of Occupational Therapists website: **https://www.rcot.co.uk/about-occupational-therapy/find-occupational-therapist**

**Quotes from contractors**

- If you are applying for a grant so that you can pay for an item or service, you need to get quotes from **at least two contractors**. Please provide us with their names, websites and contact details and enclose copies of the quotes when you submit your application.
- Where work is to be done by a contractor it is important that the contractor is able to do a good job. Please ensure that all preferred contractors are members of appropriate trade associations and, ideally, they should be VAT registered.
- We will NOT approve any requests for relatives to complete the work for you. An independent and professional contractor must be used.
- We reserve the right to carry out checks on any proposed contractors and to require an alternative contractor to be used as a condition of any grant awarded.

**Quote from doctor / dentist / funeral home**

- If you are applying for a grant to pay for medical, dental or funeral costs, you **only need to get one quote**. Please provide us with the name of your doctor / dentist / funeral home (as applicable) and their contact details. Please also enclose a copy of their quote when you submit your application.

**Household repairs**

- If you are applying for a grant to pay for household repairs and the damage is visible, you **must** send us photographic evidence of the issue and any additional damage caused as a result. Please enclose photographs when you submit your application. In some cases, the damage might not be visible (for example, a faulty boiler). If you cannot provide photographic evidence, please enclose any alternative evidence that you have available to illustrate the issue (for example, a quote from a plumber specifying the fault with the boiler and the works required to repair it).
- Please note that the bp Helios Fund will only award grants for household *repairs*, not general household *improvements*. The Trustees require evidence of need before approving a grant for household repairs. If part of the cost for your proposed works is deemed by the Trustees to be cosmetic/optional, rather than necessary, the Trustees might decide to award a grant in respect of *part* of the total costs of the proposed works only. By way of example, if some of your kitchen units have been damaged due to a leak, but you have applied for a grant to cover the costs of an entirely new kitchen, the Trustees might decide to award a partial grant for the replacement of the damaged units only.

## Section 5 guidance

**Completing the table**

- Please complete the relevant boxes of the table to tell us about **your regular income**.
- Please leave any boxes where you do not receive income blank.

**Evidence of income**

- We need you to send us **3 complete, unedited, consecutive months' bank statements** for every bank account into which you receive income.
- Please enclose **copies** of your bank statements when you submit your application. DO NOT send originals, as we cannot guarantee that these will be returned to you.

## Section 6 guidance

**Completing the table**

- **ONLY COMPLETE THIS SECTION IF YOU HAVE A SPOUSE / PARTNER.**
- Please complete the relevant boxes of the table to tell us about **your spouse/partner's regular income**.
- Please leave any boxes where you do not receive income blank.

**Evidence of income**

- We need you to send us **3 complete, unedited, consecutive months' bank statements** for every bank account into which your spouse/partner receives income.
- Please enclose **copies** of your bank statements when you submit your application. DO NOT send originals, as we cannot guarantee that these will be returned to you.

## Section 7 guidance

- Please complete the table to tell us about your savings and debts and (if applicable) your spouse/partner. Please include information about all types of savings, including:
    - Any cash amounts that you have placed into an ISA – this should include any sums you have placed into your ISA plus any interest accrued that you have decided to reinvest within your ISA rather than spend.
    - The total value of any premium bonds that you hold.
    - The total value of any investments in stocks and shares, including both direct investments and any units that you hold in an investment fund. Please provide the current value of those investments (i.e. the amount you would receive if you were to sell those stocks/shares/units today).
    - If you own a property that you do not live in, the current market value of that property (an approximate value will be acceptable, or you could tell us the price you paid for the property and the date on which you bought it; you do not need to obtain a formal valuation from an Estate Agents).
    - The total value of any other investments assets that you hold. This might include valuable artwork in which you have invested, or investments in other types of assets not listed above.
- In this section, we want to know about the total amount of savings held; not the income from your savings (all income should be included in section 6).
- Please leave blank any boxes that are not relevant to you.

**DEBTS: guidance on information to be provided**

We **only** require details of the following debts:

- Monies owing on CREDIT CARDS
- OVERDRAWN bank accounts
- Mortgages that are IN ARREARS – please provide details of the arrears
- Car loans that are IN ARREARS – please provide details of the arrears
- UNPAID AND OVERDUE utility bills

## Checklist

Have you enclosed all applicable documents in support of your application?

| | |
|---|---|
| ☐ **Applicant's proof of address:** | *Bank statement; utility bill (i.e. gas, water or electricity); or correspondence from HM Revenue & Customs (not more than three months old and must show your residential address).* |
| ☐ **If applicable, evidence of action Power of Attorney:** | *Only required if you are applying as Power of Attorney for an Applicant.* |
| ☐ **Evidence of Applicant's association with bp:** | *Bank statements, payslips, last annual bp pension statement (available on pensionline), copy of recent P60, P45 or any other evidence.* |
| ☐ **If applicable, Occupational Therapist Assessment Report:** | *Only relevant if you are applying for a mobility-related item* |
| ☐ **If applicable, quotes from two contractors:** | *If you are applying for a grant to pay for an item or service, we require at least two quotes from contractors who will carry out the work.* |
| ☐ **If applicable, quote from doctor / dentist / funeral home:** | *If you are applying for a grant to pay for medical, dental or funeral costs, we require a quote from your doctor / dentist / funeral home (as applicable).* |
| ☐ **If applicable, household repair photographic evidence:** | *If you are applying for a grant relating to household repairs and the damage is visible, we require photographs to evidence the issue and any additional damage caused as a result.* |
| ☐ **Applicant's last 3 months bank statements:** | *For all grant applications, we require 3 complete, unedited, consecutive months bank statements in respect of all current accounts into which the Applicant receives income.* |
| ☐ **If applicable, the Applicant's spouse/partner's last 3 months bank statements:** | *For all grant applications, we require 3 complete, unedited, consecutive months bank statements in respect of all current accounts into which the Applicant's spouse/partner receives income (if applicable).* |