

## The bp Helios Fund (BP Benevolent Fund)

# Application form

## Cost-of-living assistance grant

This application form should be used for the one-off cost-of-living assistance grant only.

bp has provided additional funding to support the bp Helios Fund to be able to give a one-off cost-of-living assistance grant of £2,500 for eligible bp pensioners. Provided you meet the eligibility criteria, the grant is non-taxable.

Please note we will only consider one application per household. Applications will be processed between 1 December 2023 and 31 March 2024. Any applications received after 31 March 2024 will not be processed. The information you provide will be reviewed to determine if you are eligible for the grant<sup>1</sup>.

The bp Helios Fund will allow you two attempts to supply the necessary information, after which it will have the right to reject incomplete applications. If you need help in completing this form, please contact your Pension Liaison Officer.

### Important notes

When you have completed the form, please make sure you have signed and dated it. Then return the form and copies of your evidence of income using the enclosed pre-paid envelope. Alternatively, please email your application with attachments to: bpheliosfund@colag.uk (applying by email is preferred and will allow us to process your application more swiftly).

Please do not send any original documents by post as we cannot guarantee these will be returned to you.

### Your personal information

To apply you must be currently living in the UK.

Name:
Address:
Post code:
Telephone number:
Email address <sup>2</sup> :

### Your bp pension

To apply you must receive a bp pension as a former employee or the dependant of a former employee who must have worked for bp or one of its affiliates in the UK for at least five years<sup>3</sup>.

National Insurance number:
Year joined /Year left BP:
What part of the bp business did you work in?
Status: I am a former bp employee I am the widow, widower or dependant of a deceased bp employee Other (please specify) _____  *Please circle or highlight the relevant statement

<sup>1</sup>The information you provide to the bp Helios Fund will be shared with our third-party administrator for the purposes of processing your application. It may also be shared with the BP Pension Fund and other bp group subsidiaries for the purposes of verifying the data provided in your application form.

<sup>2</sup>If you provide us with an email address, we will use it for the purpose of corresponding with you as required regarding your application and informing you of the outcome.

<sup>3</sup>This condition is waived if you retired from bp service on an incapacity pension or if the person who formally worked at bp died in bp service.

## Annual household income

Your current household income should be no more than £30,000 per annum before tax.

Please note whether income figures are before or after tax	You	Spouse/partner
bp pension:		
Pension from service with other employers:		
State pension:		
Income from employment:		
State benefits (excluding disability benefits):		
Rent or lodging income:		
Other income, such as income from investments or interest:		
Total per year:		

You will need to provide some information to support the income above:

- a copy of all bank statements showing monthly income for the last three months for you and your spouse/partner (if applicable)
- or, if you complete one, a copy of the latest tax return for you and your spouse/partner (if applicable).

By signing this application, you confirm:

- you are currently living in the UK
- you are in receipt of a pension from the BP Pension Fund
- your household income is no more than £30,000 per annum before tax. This includes your income and your spouse/partner's (if applicable) income such as a bp pension, any pension income from service with other employers, state pensions and benefits (other than disability support), and other income such as investment and rental income
- you worked at bp or one of its affiliates in the UK for at least five years; or
- if you receive a pension from the BP Pension Fund as a dependant of a former bp employee, that person worked for bp or one of its affiliates in the UK for at least five years<sup>4</sup>.

## Signature

Applicant signature:	
Date:	

By completing this form and submitting your data to the bp Helios Fund, you consent to your personal information being processed for these purposes. We will hold this data securely in the UK for a period of seven years, after which time we will delete your information.

By signing this document, you declare that the information provided is correct and truthful to the best of your knowledge. You acknowledge that if untruthful and incorrect information is provided then (i) we may reject any applications from you now or in the future or take legal action against you, and (ii) HMRC may tax you on any payment received.

The BP Benevolent Fund Trustee Limited (company number 00455852) is responsible for your personal information and is a registered charity (charity number 803778) with its registered office at Chertsey Road, Sunbury on Thames, Middlesex TW16 7BP.

<sup>4</sup>This condition is waived if you retired from bp service on an incapacity pension or if the person who formally worked at bp died in bp service.