



The Financial Assessment

What to expect

The financial assessment will be carried out by one of our Financial Assessment Officers. It is usually a face-to-face meeting, in your own home or at the Civic Centre if you prefer, and can sometimes take place over the phone. You may also need a financial assessment prior to receiving services after a hospital stay. The assessment will be based around the type of care service(s) you will receive, in your own home or in a care home (including short breaks).

If you will be receiving care in your own home

We will ask you about your income, outgoings, disability-related expenditure (DRE) and any assets or savings you have, such as property or bonds. DRE refers to any specific outgoings you have as a result of disability and which enable you to maintain your independence or quality of life. DRE may include general household expenses such as high fuel bills or clothing costs. The Assessment Officer will ask you to provide evidence about your income, expenses, assets and savings. There is a checklist on the back of this factsheet to remind you what information the officer may need. An allowance, set by the Government, will be made in the assessment for living costs.

If you have given away assets, for example money or your house, to avoid paying the full fees you need to pay, the assessment of how much you need to contribute will still include the value of the assets that have been given away.

If you are living in, or will be moving to, a care home

We will work out whether we will pay towards the cost of your care and support. We will look at your capital, income and whether you own (or part-own) your own home.

If you have given away assets, for example money or your house, to avoid paying the full fees you need to pay, the assessment of how much you need to contribute will still include the value of the assets that have been given away.

Checklist (amount each month and tick off when you have the evidence)

Income	Evidence required	
Benefits	Decision letter, bank statement	<input type="checkbox"/>
Pensions/Annuities	Letter from provider, bank statement	<input type="checkbox"/>
Earnings	Pay slips	<input type="checkbox"/>
Rental income	Bank statement, rent book, tenancy agreement	<input type="checkbox"/>

Assets	Evidence required	
Bank accounts	Bank statement, passbook	<input type="checkbox"/>
Stocks, shares	Certificates	<input type="checkbox"/>
ISAs and other investments	Statements, certificates	<input type="checkbox"/>

Expenses	Evidence required	
Fuel costs	Utility bill	<input type="checkbox"/>
Disability Related Expenses	Receipts, invoices	<input type="checkbox"/>
Rent, service charges	Tenancy agreement, letter from landlord, invoices	<input type="checkbox"/>

Contact details

If you would like to find out more, please contact the Financial Assessment Team on 01202 633535 or email f.socialservices@bcpcouncil.gov.uk. For more information about services please go to www.mylifemycare.com.

To request or download a copy of this factsheet:

Tel. 01202 633902 / email sshelpdesk@bcpcouncil.gov.uk
or download at www.poole.gov.uk/adultsocialcarefactsheets



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