

## Personal Injury Trust Assessment Form

### Personal Injury Settlement Details

**PLEASE COMPLETE THE FORM IN BLOCK CAPITALS**

SOLICITOR'S FIRM \_\_\_\_\_ SOLICITOR'S NAME \_\_\_\_\_  
 TELEPHONE NUMBER \_\_\_\_\_ EMAIL ADDRESS \_\_\_\_\_  
 IS THE CLAIMANT A PROTECTED PARTY? YES  NO  WHEN DO YOU ANTICIPATE PAYMENT? \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
 IS THE CLAIMANT A CHILD? YES  NO  INTERIM PAYMENTS? \_\_\_\_\_  
 ANTICIPATED LEVEL OF DAMAGES \_\_\_\_\_ DATE FIRST PAYMENT RECEIVED? \_\_\_\_ / \_\_\_\_ / \_\_\_\_  
 PLEASE CONFIRM THAT IT IS ACCEPTABLE TO CONTACT THE CLAIMANT DIRECTLY? YES  NO

### Claimant Details

TITLE MR  MRS  MISS  MS  OTHER \_\_\_\_\_ POSTCODE \_\_\_\_\_  
 FIRST NAME \_\_\_\_\_ MARITAL STATUS \_\_\_\_\_  
 MIDDLE NAME (S) \_\_\_\_\_ NATIONALITY \_\_\_\_\_  
 SURNAME \_\_\_\_\_ PLACE OF BIRTH \_\_\_\_\_  
 ADDRESS \_\_\_\_\_ CONTACT TEL NO. \_\_\_\_\_  
 \_\_\_\_\_ DATE OF BIRTH \_\_\_\_ / \_\_\_\_ / \_\_\_\_

### What benefits are the claimant and/or their partner currently getting?

#### PLEASE INDICATE THE WEEKLY AMOUNT BELOW

INCOME SUPPORT:	£ _____	PENSION CREDIT:	£ _____
INCOME BASED JOBSEEKER'S ALLOWANCE:	£ _____	HOUSING BENEFIT:	£ _____
EMPLOYMENT AND SUPPORT ALLOWANCE:	£ _____	COUNCIL TAX BENEFIT:	£ _____
INCAPACITY BENEFIT:	£ _____	DISABILITY LIVING ALLOWANCE CARE:	£ _____
CARER'S ALLOWANCE:	£ _____	DISABILITY LIVING ALLOWANCE MOBILITY:	£ _____

#### DO YOU RECEIVE ANY OTHER BENEFITS (SUCH AS TAX CREDITS)? IF YES, PLEASE DETAIL THE TYPE AND WEEKLY AMOUNTS:

\_\_\_\_\_  
 \_\_\_\_\_

### Your capital

DO THE CLAIMANT OR THEIR PARTNER HAVE ANY SAVINGS? (including bank/building society accounts, shares, premium bonds etc)

IF SO, PLEASE INDICATE THE TOTAL VALUE: £ \_\_\_\_\_

PLEASE TELL US BRIEFLY IF THEY HAVE ANY IMMEDIATE SPENDING PLANS ONCE THEY HAVE RECEIVED YOUR AWARD:

\_\_\_\_\_  
 \_\_\_\_\_

### Welfare Benefit Advice

If the claimant is in receipt of welfare benefits or in the process of making a claim we can provide a comprehensive Welfare Benefits review. We will consider their circumstances to check their benefits are correct and establish if you are eligible for any additional help in the interest of maximizing their entitlement.

Would you like our Welfare Benefit Advisor to contact the claimant regarding this service? YES  NO

Please note that no charges will be made for either Personal Injury Trust or a Welfare Benefits review until we have established the claimant's needs.

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### Data Protection

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The information you have provided is subject to the Data Protection Act 1998 (the "Act"). By signing this document you consent to us or any company associated with us for processing, both manually and by electronic means, your personal data for the purposes of providing advice, administration and management.

"Processing" includes obtaining, recording or holding information or data, transferring it to other companies associated with us, product providers, the FCA or any other statutory, governmental or regulatory body for legitimate purposes including, where relevant, to solicitors and/or other debt collection agencies for debt collection purposes and carrying out operations on the information or data.

In order to provide services to you we may be required to pass your personal information to parties located outside of the European Economic Area (EEA) in countries that do not have a Data Protection Laws equivalent to those in the UK. Where this is the case we will take reasonable steps to ensure the privacy of your information.

The information provided may also contain sensitive personal data for the purposes of the Act, being information as to your physical or mental health or condition; the committing or alleged committing of any offence by you; any proceedings for an offence committed or alleged to have been committed by you, including the outcome or sentence in such proceedings; your political opinions; religious or similar beliefs; sexual life; or your membership of a Trade Union.

If at any time you wish us or any company associated with us to cease processing your personal data and sensitive personal data, please contact The Data Protection Officer on 0161 763 4800 or in writing at Nestor Financial Group Limited, Controlled House, Waterfold Business Park, Rochdale Road, Bury, BL9 7BR.

You may be assured that we and any company associated with us will treat all personal data and sensitive personal data as confidential and will not process it other than for a legitimate purpose. Steps will be taken to ensure that the information is accurate, kept up to date and not kept for longer than is necessary. Measures will also be taken to safeguard against unauthorised or unlawful processing and accidental loss or destruction or damage to the data.

Subject to certain exceptions, you are entitled to have access to your personal and sensitive personal data held by us. You may be charged a fee (subject to the statutory maximum) for supplying you with such data.