

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

Means-tested benefits

Income support: £
Income-based jobseeker's allowance: £
Income-related employment
& support allowance: £
State pension credit: £
Housing benefit: £
Council tax support: £
Universal credit: £

Non-means-tested benefits

Incapacity benefit: £
Contribution-based jobseeker's allowance: £
Contributory employment
& support allowance: £
Carer's allowance: £
State retirement pension: £
DLA/PIP mobility: £
DLA/PIP care/Daily living: £

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 you have received your award:



Personal Injury Trust Assessment Form

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 maximising their entitlement.

Would you like our Welfare Benefit Advisor to contact you 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.

Protecting your data

Nestor is committed to protecting your personal data. Our privacy notice summarises how we collect, store and handle your personal data and can be found at www.nestor.co.uk/privacy-notice. A hard copy is available on request.

