

THE CHURCH OF ENGLAND PENSIONS BOARD
29 GREAT SMITH STREET, LONDON, SW1P 3PS
Registered Charity No236627

Reference:

CONFIDENTIAL

HOUSING ASSISTANCE **INITIAL APPLICATION**

Please use block capitals

APPLICANT

SURNAME.....TITLE.....

CHRISTIAN NAME/S.....DATE OF BIRTH.....

SPOUSE

CHRISTIAN NAME/S.....DATE OF BIRTH.....

CURRENT ADDRESS.....

POSTAL CODE.....TELEPHONE NUMBER.....

A. Present appointment (if applicable).....

Date of retirement from full time work (if applicable).....

Is this date firm? YES/NO/NOT APPLICABLE *

B. Please state whether you require a flat, bungalow, or house, the area where you wish to live, and the likely price. **The accommodation should have no more than two reception rooms and two or three bedrooms and should not exceed 900 sq. ft..**

C. Do you already own a property? YES/NO *

If so, please give details of the property, why it is not suitable for your retirement, its current value, and what loans are outstanding on it.

D. If you already live in a retirement property owned or mortgaged to you by the Pensions Board, any other Church body, or a secular organisation, please give your reasons for wanting to move.

E. If there are any particular circumstances you would like us to take into account, please indicate these in a covering letter.

PLEASE LIST YOUR FINANCES OVERLEAF

*** Delete as appropriate**

F. CURRENT FINANCIAL RESOURCES

Please summarise your **present** total personal capital and your estimated retirement income **excluding** your pension from the Church of England.

**NOTE: THIS INFORMATION RELATES TO BOTH YOU AND YOUR SPOUSE.
PLEASE DO NOT PROVIDE FIGURES WHERE MARKED***

INVESTMENTS – PRESENT CAPITAL VALUES

£

-Bank Account Balances:

- 1) Current account/s.....
- 2) Deposit account/s.....
- 3) Other/s.....

-Building Society Accounts:

- 1).....
- 2).....

-Stocks, Shares and Unit Trusts:

- 1).....
- 2).....
- 3).....

-Life Assurance Policies (Please quote maturity dates):

- 1).....
- 2).....

-Other Disposable Assets (including property owned, if applicable):

- 1).....
- 2).....

-Church of England Lump Sum*

-LESS Outstanding Mortgages and Loans:

- 1)..... (.....)
- 2)..... (.....)

Total * _____

ANNUAL INCOME IN RETIREMENT

RETIREMENT EARNINGS (if known).....

ANNUITIES.....

PENSIONS

STATE (please consult the Department of Social Security).....

CHURCH OF ENGLAND *.....

FROM ALL OTHER SOURCES

- 1).....
- 2).....

SIGNATURE/S

Total * _____

Applicant.....

Spouse.....

Date.....20

PLEASE PROVIDE DETAILS OF YOUR NEXT OF KIN ON THE FORM ATTACHED