



COATS FOUNDATION TRUST
Financial Assistance Application
for Members of the
Coats UK Pension Scheme

If you would like to make an application for funding, please complete this form and send it to:
Coats Foundation Trust, PO Box 2043, Pershore, WR10 9ES or by email to
pensions.services@coats.com

Member Name: _____ Scheme Ref No
(if known) or NI No: _____

Address: _____

Postcode: _____

Data Protection

The Trustee of the Coats Foundation Trust will use the information you give about yourself in this form to help decide whether to award a grant. Your information will be kept strictly confidential and will not be used for any other purposes. You can read more information about how the Trustee will use your information, including how long it will be retained for, in the Trust's Privacy Notice which is available on our website www.coatspensions.co.uk or as a paper copy by request.

In order for the Trustee to process your personal information the Trustee needs your consent to do so. This consent includes any information you provide which relates to the health of an individual or 'sensitive personal data' which you choose to share in support of your application. If you decide to give us your consent, you can withdraw it at any time.

I state that the information provided on this form is true to the best of my knowledge.

I consent to the Trustee of the Coats Foundation Trust processing any personal data I have provided in support of my application. I am aware that I can withdraw my consent at any time. Where I have provided information about another person I confirm I am authorised to give this consent on their behalf.

Signature

Date

Please provide a detailed explanation of why you require financial assistance:

Give full details of what the funding requested would be used to pay for, for example, boiler breakdown, mobility scooter or other. **Please be specific.** You must provide quotes for the items required where applicable:

We also need to see:

- Proof of income/expenditure. This includes a recent bank statement and a breakdown of your income and outgoings (please complete enclosed financial statement).
- Evidence of the item(s) required in the form of an up-to-date quote or receipt
- Any other relevant information you think would be helpful to the Trustees when they are considering your application.

Applications received which do not have all the information required will not be put forward for consideration, so please make sure you have completed this form correctly.

If you have any questions, please email pensions.services@coats.com or telephone 0141 207 6800.