



# New Applicant Form

## 1 Year of retirement – please tick

- 2022       2023       2024       2025       2026  
 2027       2028       2029       2030       Other

## 2 Your Household

### APPLICANT(S)

	LEAD APPLICANT	SECOND APPLICANT
Title		
Forename(s)		
Surname		
Phone/Mobile		
Email		
Date of Birth		
NI Number		

### ADDRESS AT TIME OF APPLICATION

Full Address	
Post Code	

### OTHER HOUSEHOLD MEMBERS

Will you have anyone else living with you?    Yes    No  
If yes, please give details below.

Full Name	Relationship to you	Over or Under 18?



### 3 Eligibility for an MMHS home

#### 3a LENGTH OF SERVICE

You would be expected to have completed 10 years of eligible service with the Methodist Church (see notes for details).

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Church/Circuit (or equivalent appointment)	Position Held	Start (Year)	End (Year)	Full Time	Part Time

#### 3b ESTIMATE OF CAPITAL ASSETS

Will you be in receipt of your full Methodist Church Pension at the point of your retirement? (Please tick)  Yes  No

Please provide full details of your expected annual income at the point of retirement together with details of your capital assets as at the date of this application.

ASSETS	LEAD APPLICANT	SECOND APPLICANT
<b>Annual Income (gross)</b> Include: church pension, state pension and any privately arranged pension or income.	£	£
<b>All Capital Assets</b> Exclude: property which is dealt with separately <b>and</b> any lump sum you will be opting for on retirement from the Methodist Church Pension Scheme but include any other lump sums. Include: current accounts, savings accounts, unit and/or investments trusts, all bonds and stocks, all shares, money market instruments and premium bonds – including those held in tax wrappers like ISAs, TESSAs and PEPs.	£	£



### 3b Continued

Do you currently own or have a financial interest in any **property**?

(Please tick)  Yes  No

If the answer is 'yes' to the previous question about a property, please state the <b>net</b> value (after mortgage repayment etc.) of your share	£	£
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## 4 Your Property and Location Needs

### 4a PREFERRED LOCATION FOR RETIREMENT

We have a dynamic property portfolio and, whenever we can, we try to find retirement homes from this. However, we cannot always guarantee a specific location.

Please indicate which Districts are of interest to you at this time, you may tick as many as you wish at this stage.

- |  |  |
|--|--|
| <input type="checkbox"/> Birmingham                            | <input type="checkbox"/> Bolton and Rochdale             |
| <input type="checkbox"/> Bristol                               | <input type="checkbox"/> Channel Islands                 |
| <input type="checkbox"/> Chester & Stoke-on-Trent              | <input type="checkbox"/> Cornwall & Isles of Scilly      |
| <input type="checkbox"/> Cumbria                               | <input type="checkbox"/> Cymru/Wales                     |
| <input type="checkbox"/> Darlington                            | <input type="checkbox"/> East Anglia                     |
| <input type="checkbox"/> Isle of Man                           | <input type="checkbox"/> Lancashire                      |
| <input type="checkbox"/> Lincolnshire                          | <input type="checkbox"/> Liverpool                       |
| <input type="checkbox"/> Manchester & Stockport                | <input type="checkbox"/> Newcastle upon Tyne             |
| <input type="checkbox"/> Northampton                           | <input type="checkbox"/> Nottingham & Derby              |
| <input type="checkbox"/> Plymouth & Exeter                     | <input type="checkbox"/> Sheffield                       |
| <input type="checkbox"/> Southampton                           | <input type="checkbox"/> Scotland                        |
| <input type="checkbox"/> Wolverhampton & Shrewsbury            | <input type="checkbox"/> Yorkshire West                  |
| <input type="checkbox"/> Shetland                              | <input type="checkbox"/> London                          |
| <input type="checkbox"/> South East                            | <input type="checkbox"/> Yorkshire North & East District |
| <input type="checkbox"/> Bedfordshire, Essex and Hertfordshire | <input type="checkbox"/> Anywhere                        |

### 4b PREFERRED TYPE OF PROPERTY

- |                                     |                                   |                                 |
|-------------------------------------|-----------------------------------|---------------------------------|
| <input type="checkbox"/> House      | <input type="checkbox"/> Bungalow | <input type="checkbox"/> Flat   |
| <input type="checkbox"/> Garden     | <input type="checkbox"/> Shed     | <input type="checkbox"/> Garage |
| Bedrooms <input type="checkbox"/> 1 | <input type="checkbox"/> 2        | <input type="checkbox"/> 3      |
|                                     | <input type="checkbox"/> 4        | <input type="checkbox"/> 5      |



### 4c MEDICAL OR WELFARE NEEDS

PLEASE PROVIDE INFORMATION TO EXPLAIN YOUR **KEY NEEDS** SUCH AS THOSE LINKED TO MOBILITY ISSUES, FAMILY SUPPORT AND MEDICAL CONDITIONS.

*CONTINUE ON A SEPARATE SHEET IF NECESSARY.*

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### 5 Declarations

- I/we confirm that the information given above is correct and accurate the best of my/our knowledge.
- I/We confirm that I/we have not knowingly withheld any relevant information from the Society.
- I understand that the Society’s auditors can request verification of any figures given.

PLEASE SIGN	Signature	Date
LEAD APPLICANT		
SECOND APPLICANT		

#### Privacy

We will use your information to provide you with the services, products or information you have requested, for administration purposes and to further our charitable aims. Contact details (name, address, telephone no, email address) may be shared with third parties such as contractors to enable them to access properties owned by MMHS. The MMHS Privacy Policy can be found online at: [mmhs.org.uk/your-privacy](http://mmhs.org.uk/your-privacy).

Please **tick the box** to confirm that you have been given the **opportunity** to locate, read and understand the MMHS Privacy Policy.