

## Citizens Advice Hampshire

### Confidence With Benefit Calculators - Benefits Checklists – HO2 Case Studies

#### CASE STUDY 1 – TRUDI ANGELI, Flat 14b, Lady Place Court, Market Square, Alton.

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Trudi Angeli	35	07/11/1986	N/A
Partner				
Child 1	Marcus Angeli	5	07/11/2016	M
Child 2				
Child 3				
Child 4				
Anyone else living in household?				

**CAPITAL** = £ \_\_\_\_ NIL \_\_\_\_\_

EARNED INCOME	Client	Partner
Employed / self employed?	Employed	
Number of hours worked	15 / wk / mth	
Gross pay	£133.65 / wk / mth	
Pension contributions	-	
Net pay	£133.65 / wk / mth	
Is income variable?	no	

<b>CHILDCARE COSTS</b>	£ 20	wk / mth	In respect of how many children?	1
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#### BENEFIT INCOME

Client/partner	Name of benefit	Amount	Weekly/monthly
Client	Tax Credits	£ not sure	
Client	CB	£ not sure	
	Housing Benefit	£ not sure	

#### OTHER INCOME (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
		£	
	Child maintenance	£ 30	wk
		£	

#### HOUSING COSTS

Rent / Mortgage	£ 700	Wk/mth/yr
Service Charge	£ -	Wk/mth/yr
Council Tax Band: not sure	£ not sure	Wk/10 mth /12 month / yr

#### HOUSING TYPE ✓

Owner – with mortgage	Private Tenant	tenant (not liable)
Owner – no mortgage	Social Tenant	✓ Temporary accom
shared ownership	living with family	supported accom
Other:		
How many bedrooms?	2	Postcode GU34 1HD

#### SPECIAL NEEDS eg mental health, physical disability

N/A
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#### CHANGES Are your circumstances about to change which may affect the above?

N/A
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**CASE STUDY 2 – SAM BRUCE, 32 LADY PLACE COURT, 4 MARKET SQUARE, ALTON**

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Sam Bruce	35	07/11/1986	
Partner	Alex Bruce	35	07/11/1986	
Child 1	Johnny	6	07/11/2015	
Child 2	Janet	3	07/11/2018	
Child 3	Jane	3	07/11/2018	
Child 4				
Anyone else living in household? No				

**CAPITAL** = £        £3500       

EARNED INCOME	Client	Partner
Employed / self employed?	Unemployed	Employed
Number of hours worked	0 / wk / mth	6 / wk / mth
Gross pay	0 / wk / mth	£53.46 / wk / mth
Pension contributions	0 / wk / mth	0 / wk / mth
Net pay	0 / wk / mth	£53.46 / wk / mth
Is income variable?		No

<b>CHILDCARE COSTS</b>	£ NIL	wk/mth	In respect of how many children?	
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**BENEFIT INCOME**

Client/partner	Name of benefit	Amount	Weekly/monthly
Sam	NS-JSA	£74.70	week
Alex	Child Benefit	£ not sure	
joint	Universal Credit	£ not sure	

**OTHER INCOME** (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
	None	£	
		£	

**HOUSING COSTS**

Rent / Mortgage	£950	Wk/mth/yr
Service Charge	£ NIL	Wk/mth/yr
Council Tax Band: Don't know	£??	Wk/10 mth /12 month / yr

**HOUSING TYPE** ✓

Owner – with mortgage	✓	Private Tenant	tenant (not liable)
Owner – no mortgage		Social Tenant	Temporary accom
shared ownership		living with family	supported accom
Other:			
How many bedrooms?	3	Postcode	GU34 1HD

**SPECIAL NEEDS** eg mental health, physical disability

none
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**CHANGES** Are your circumstances about to change which may affect the above?

none
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### CASE STUDY 3 – PAUL AND JULIE, 1 LADY PLACE COURT, MARKET SQUARE, ALTON

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Paul Smith	35	07/11/1986	
Partner	Julie Bloggs	35	07/11/1986	
Child 1	Rachel Smith	12	07/11/2009	
Child 2				

Anyone else living in household? No

**CAPITAL** = £ \_\_\_\_\_ 0.00 \_\_\_\_\_

EARNED INCOME	Client	Partner
Employed / self employed?	Employed	
Number of hours worked	30	wk/mth
Gross pay	£267.30	wk/mth
Pension contributions	Nil	wk/mth
Net pay	£252.07	wk/mth
Is income variable?		

<b>CHILDCARE COSTS</b>	£ NIL	wk/mth	In respect of how many children?	
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#### BENEFIT INCOME

Client/partner	Name of benefit	Amount	Weekly/monthly
Client	Child Benefit	£ not sure	
	PIP Mobility Enhanced Rate	£62.55	wk
	(hoping soon to get Daily living Standard Rate)	(£60.00)	wk

#### OTHER INCOME (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
	none	£	
		£	

#### HOUSING COSTS

Rent / Mortgage	£950	Wk/mth/yr
Service Charge	£ nil	Wk/mth/yr
Council Tax Band: C	£	Wk/10 mth /12 month / yr

#### HOUSING TYPE ✓

Owner – with mortgage		Private Tenant	✓	tenant (not liable)	
Owner – no mortgage		Social Tenant		Temporary accom	
shared ownership		living with family		supported accom	
Other:					
How many bedrooms?	2	Postcode	GU34 1HD		

#### SPECIAL NEEDS eg mental health, physical disability

Paul is currently getting PIP mobility component enhanced rate, but is about to apply for upgrade to add Daily Living component, expecting to get Standard Rate.

#### CHANGES Are your circumstances about to change which may affect the above?

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**CASE STUDY 4 MANSOOR AND SAAID, 36 LADY PLACE COURT 4, MARKET SQUARE, ALTON**

HOUSEHOLD	Name	Age	Date of birth	Gender
Client	Mansoor Ashar	75	07/11/1946	M
Partner				
Child 1	Saaid Ashar	17	07/11/2004	M
Child 2				
Child 3				
Anyone else living in household? No				

**CAPITAL** = £ \_\_\_\_\_ 12,000 \_\_\_\_\_

EARNED INCOME	Client	Partner
Employed / self employed?	No	
Number of hours worked		
Gross pay		
Pension contributions		
Net pay		
Is income variable?		

<b>CHILDCARE COSTS</b>	£ NIL	wk/mth	In respect of how many children?	
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**BENEFIT INCOME**

Client/partner	Name of benefit	Amount	Weekly/monthly
		£	
Client	State Retirement Pension	£137.60	wk
Client	Child Benefit	£	
Client	Housing benefit	£can't remember	

**OTHER INCOME** (eg child maintenance, occupational pension etc.)

Client/partner	Type of income	Amount	Weekly/monthly
	None	£	
		£	

**HOUSING COSTS**

Rent / Mortgage	£ 850	Wk/mth/yr
Service Charge	£ nil	Wk/mth/yr
Council Tax Band: C	£	Wk/10 mth /12 month / yr

**HOUSING TYPE** ✓

Owner – with mortgage		Private Tenant		tenant (not liable)	
Owner – no mortgage		Social Tenant	✓	Temporary accom	
shared ownership		living with family		supported accom	
Other:					
How many bedrooms?	3	Postcode	GU34 1HD		

**SPECIAL NEEDS** eg mental health, physical disability

Saaid is his father's carer.
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**CHANGES** Are your circumstances about to change which may affect the above?

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