**Macmillan Financial Guidance Team**

**Referral Form CONFIDENTIAL**

*Macmillan Cancer Support offers a comprehensive financial support for people affected by cancer. This Financial Guidance service is accessed through the Macmillan Support Line, where expert staff offer information,and guidance on a variety of financial issues including mortgages, insurance, pensions and estate planning. All guidance is free, confidential and impartial.* *If you are unsure about making a referral or have any questions about the services we offer, please email* [***financialguidance@macmillan.org.uk***](mailto:financialreferrals@macmillan.org.uk)

**Customer details**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Title |  | | | | | | | |
| First name |  | | | | | | | |
| Surname |  | | | | | | | |
| Address |  | | | | | | | |
| Postcode |  | | | | | | | |
| Telephone |  | | | Mobile | |  | | |
| Email |  | | | | | | | |
| Date of birth (DD/MM/YYYY) |  | | |
| Customer: | Cancer diagnosis | | Carer | | Relative | | | Other |
| Diagnosis |  | | | | | | | |
| DS1500 Issued? | *Yes*   No  Unknown | | | | | | | |
| Is customer aware of prognosis? | *Yes*   No  Unknown | | | | | | | |
| Can we leave a message? | *Yes* No | Can we say it’s Macmillan? | | | | | Yes No | |
| When to avoid contact |  | | | | | | | |

**Reason(s) for referral *(Please tick)***

|  |  |  |  |
| --- | --- | --- | --- |
| **Mortgages** |  | **Benefits** |  |
| *Struggling with mortgage payments? Having difficulty explaining your situation to your lender? Unsure of the options available?* |  | *Need help to know what benefits you are entitled to? Need help to claim? Are you unsure of the options available?* |  |
| **Insurance** |  | **Energy** |  |
| *Having difficulty claiming your insurance policy? Concerned about travel insurance, critical illness or life insurance? Unsure of the options available?* |  | *Concerned about fuel or water debt? In need of insulation? Experiencing problems with your boiler? An npower customer?* |  |
| **Pensions** |  | **Macmillan Grant** |  |
| *Unsure what to do with your personal or company pension? Thinking of retiring? Unsure of the options available?* |  | *On a low income and need help with the costs caused by or related to your cancer?* |  |
| **Wills and Estate Planning** |  | **Employment** |  |
| *Considering making a will? Worried about who’ll look after your affairs? Unsure of the options available?* |  | *Experiencing problems at work due to cancer or caring? Unsure of the options available?* |  |
| **Budgeting** |  | **Debt** |  |
| *Having difficulty making financial decisions? Worried how to budget with less money coming in? Unsure of the options available?* |  | *Worried about debt? In need of a debt management plan? Struggling with debt repayments? Unsure of the options available?* |  |
| **Other financial concerns** *(not covered above)* | | | |
|  | | | |

**Interventions to date**

|  |
| --- |
| Can you give a short overview of the interactions with your service? |
| *i.e.; Has a benefits check already been completed* |

**Comments**

|  |
| --- |
| Please specify any relevant information |
|  |

**Referrer details**

|  |  |  |  |
| --- | --- | --- | --- |
| Name |  | Organisation |  |
| Phone |  | Job Title |  |
| Email address |  | | |

**Authorisation**

*By providing your details here you consent to them being shared with Macmillan Cancer Support’s Financial Guidance Team (which is part of Macmillan’s Support Line Services). Your details will be passed electronically (by email) and the receiving organisation will gain additional consent at this point. The Financial Guidance Team will use these details to contact you and assess what support they can provide you with. If you change your mind, please contact* [*financialguidance@macmillan.org.uk*](mailto:financialguidance@macmillan.org.uk)*or call the Macmillan Support Line on 0808 808 0000. Please see their privacy policy for more information at* [*www.macmillan.org.uk*](http://www.macmillan.org.uk)*.*

*You will have an opportunity (in addition to the above) to consent with the Macmillan’s Support Line Services as to whether you wish to receive other services, updates or information from Macmillan.*

|  |  |  |  |
| --- | --- | --- | --- |
| **Signature**  **(Customer or referrer)** |  | **Date** (DD/MM/YYYY) |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Do we have permission to record customer details?** | Yes |  | No |

**Please email this form to** [**financialguidance@macmillan.org.uk**](mailto:financialguidance@macmillan.org.uk)

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| --- |
| **If you would like someone to talk to or have any questions about cancer, call us on**  **0808 808 0000 (Mon to Sun, 8am – 8pm).** |