

PERSONAL ASSISTANCE SUPPLEMENTAL INFORMATION FORM

**(To be completed and returned with regular grant application form
when applying for personal assistance)**

Supporting Lodge: _____

Applicant: _____

Occupation: _____ Years Employed: _____

HOUSEHOLD INCOME/EXPENSE REPORT

As of _____

MONTHLY INCOME

Salary 1: Gross \$ _____ Net \$ _____
Salary 2: Gross \$ _____ Net \$ _____
Child Tax Credit \$ _____
Unemployment Insurance \$ _____
Government Assistance \$ _____
Other Income (specify, i.e. child support,
Investment income, etc.)

TOTAL MONTHLY INCOME \$ _____

**NOTE: PLEASE ATTACH COPIES OF THE TWO
MOST RECENT INCOME TAX NOTICE OF
ASSESSMENTS.**

STATEMENT OF ASSETS

Buildings Owned \$ _____
Land \$ _____
Machinery \$ _____
Savings/Bonds/Stocks \$ _____
RRSP's or Other \$ _____
Cars/Trucks \$ _____
Boats/Recreation Vehicles \$ _____
Personal Property \$ _____

TOTAL GROSS ASSETS \$ _____

Mortgages or outstanding debt on
above assets (please specify):

Total Owing \$ _____

NET EQUITY IN ASSETS \$ _____

MONTHLY EXPENSES

Mortgage (Res. Only) \$ _____/mo.
Taxes (Res. Only) \$ _____/mo.
Rent (Res. Only) \$ _____/mo.
Home Insurance \$ _____/yr. \$ _____/mo.
Loan/Credit Card Payments (specify amounts owing):

Car Loan \$ _____/mo.
Car Insurance \$ _____/mo.
Gas & Oil \$ _____/mo.
Food \$ _____/mo.
Utilities \$ _____/mo.
Health Insurance \$ _____/mo.
Life Insurance \$ _____/mo.
Medical Expenses (specify)

Clothing \$ _____/mo.

Other Expenses (specify):

Baby-sitter/Day-care
(if not subsidized) \$ _____/mo.
Entertainment \$ _____/mo.

TOTAL MONTHLY EXPENSES \$ _____/mo.

SURPLUS \$ _____/mo.

(INCOME LESS EXPENSES) \$ _____/mo.

FAILURE TO PROVIDE ADEQUATE INFORMATION WILL DELAY THE PROCESSING OF YOUR APPLICATION



REACHING OUT TO OTHERS

PROCEDURES FOR SUBMITTING APPLICATIONS FOR PERSONAL ASSISTANCE

PURPOSE: The Foundation may provide financial assistance for any purpose whatsoever that is for the good and welfare of a person resident within the jurisdiction of the Alberta Elks Association, which has been approved as an appropriate purpose by the Trustees.

GUIDELINES: When submitting requests for assistance, it is essential that the following steps be taken to supply the necessary information for proper assessment by the Foundation Trustees.

1. It is the responsibility of the Lodge Charities Chairman (or Committee) to conduct a complete investigation of each case submitted. **If, after investigation, the Lodge does not see a need, the application process need not proceed any further.**
2. In addition to the regular application form, it is very important that the Family Income/Expense Report and a cover letter accompanies the application in order to give further background information for assessment and any personal comments or insights you may have.
3. The financial status of the family must be identified including the annual net income from all sources of employment (full and part-time), family allowances (Child Tax Credits), alimony or child support. Please secure a copy of the family's two most recent income tax Notice of Assessment(s). Report current liabilities in detail with information regarding the repayment of such debts along with a statement of monthly expenses.
4. Include a letter from a doctor or other medical professional giving a detailed estimate of cost and duration of required assistance as well as confirmation of need. When asking professionals for confirmation of diagnosis, advise them that this information will be held in confidence.
5. Include information on whether any part of the expenses could be met from other sources (such as medical plans or group benefits). Also, have they applied for funding from any other sources not mentioned?
6. When suppliers or professional people are involved, payment should be made directly to them, with a receipt being obtained and kept for the records. When paying for travel or accommodations, coverage is limited to a matching grant of \$500.00. Lodges should ask for confirmation of expenditures through receipts.
7. Applications for assistance should be submitted to the office before any Lodge assistance is granted. The Lodge should not commit themselves until they have received word from the Foundation. Note: If there is urgency, phone the Foundation Secretary and express the concerns.
8. In arrangements for publicity, the Foundation shall be acknowledged for their contribution and in cases where publicity is not possible, the recipient shall be informed of the Foundation's contribution.
9. On each request, the Lodge shall inform the applicant of the decision of the Alberta Elks Foundation Trustees. In most cases, cheques are made payable from the Foundation to the Recipient.