

Information on financial assessments

What is the process?

Financial assessments can be completed in a variety of ways, including online or in person. This will be based on individual needs and preference.

They will be carried out by the Council Money Advice and Rights Team (MART).

They will look at your income and expenditure to establish if you meet the criteria to contribute to the cost of your care.

What documents will you need?

- **Bank statements.** We will look at around 3 months worth and can do this digitally (via your online banking/app) or with paper copies
- **Benefits letter** (if applicable)
- **Pension letter** (if applicable)
- Details of **any capital** that you have like property, stocks, shares or savings
- **Expenditure** that is directly related to any disability will be taken off your income. We will ask for copies of receipts or invoices to verify any relevant expenses

What?

We are offering people who have chargeable non-residential care services in their care plan a financial assessment.

Why?

To help people prepare for charges for non-residential care services coming in from April 2026. A financial assessment will help us;

- Tell you if you might need to pay
- Tell you how much you might need to pay
- Give the right information to the Council

Information on income maximisation

What is income maximisation?

Income maximisation aims to make sure you are receiving all the benefits you are entitled to.

What does it involve?

We will talk to you about who is living in the household, their ages, incomes, caring responsibilities, health needs or disabilities. We need this information to determine your entitlements and use the information to help you make any appropriate benefit claims.

The Money Advice & Rights Team (MART)



Help to budget



Help to apply for benefits



Help to challenge benefit decisions



Help with debt

In 2024 MART helped over 5,500 people with income maximisation.

They helped people get over £10 million!


About MART

MART services are:

- Free
- Non-judgemental
- Independent
- Confidential

Contact details

 Phone: **0141 577 8420**

 Monday to Friday, 8:45am to 4:45pm (Friday, 3:55pm)

 Website: www.eastrenfrewshire.gov.uk/mart

Tell MART if you need extra help with your appointment.