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| http://www.snscab.org.uk/assets/Uploads/PotteriesMoneyWise-logo.png | Potteries MoneyWise  **Referral Form**  *Please complete the form in full and return to*  **pmw@casns.org.uk**  01782 408685 | C:\Documents and Settings\bakera\my documents\Downloads\Logo_CMYK_300_A3 (2).png |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Date of Referral** |  | | | | | | |
| **Client Full Name** |  | | | | | | |
| **Client Address** |  | | | | | | |
| **Client Phone No.** |  | | | | | | |
| **Client Email** |  | | | | | | |
| **Client would prefer contact by:**  *(highlight or circle)* | | **Phone call** | | **Text** | | **Email** | **Post** |
| **Is an interpreter required?** | | **Y / N** | **Language?** | | | | |
| **Referrer Name** |  | | **Phone** | |  | | |
| **Referrer Role** |  | | **Organisation** | |  | | |
| **Referrer Email** |  | | | | | | |

|  |  |
| --- | --- |
| **Please detail reason for referral, background information & areas of concern (risk):** | |
|  | |
| **Please tick all issue that the client needs help with:** | |
| |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | Budgeting & Money Management | Energy Issues | Council Tax Support | Benefit Checks | Charity Applications or Grants | Water bills | Debts | | |
| Please highlight/circle if the client would benefit from an in person appointment at our office instead of a phone appointment. If they require a home visit, please state the reason above. | **Y / N** |
| Would the client prefer an AM or PM call when we phone to arrange their appointment with an advisor? | **AM / PM** |

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| **Consent to referral and share data with PMW** | Potteries MoneyWise will process your personal data in accordance with the General Data Protection Regulation and Data Protection Act 2018. Please refer to the Privacy Policy at <http://www.snscab.org.uk/privacy-notice/> for more information on how your personal data will be processed and stored. | |
| **Please state if client consents to data share with Potteries MoneyWise** | | **Y / N** |