

Referring your client for help



Is your client eligible for referral? Unsure?
Email or phone us and we can confirm instantly.
(Mon - Fri 9am - 5pm)
advice@pennysmart.org.uk
Tel: 01244 651210



 Yes, your client is eligible!
Complete form overleaf giving details of the situation.
Or online at:
<https://www.pennysmart.org.uk/referrals>



This will give us Data Protection consent to contact the client directly to arrange a money advice appointment as soon as we can contact them.





Please inform your client that we will phone them within 2 days of receiving the form and to expect a call from us that they will need to pick up.



If the referral form has not been completed via our referral portal - please email or telephone the completed referral form.
We will arrange out-bound contact with an adviser in less than 2 working days.
01244 651210
advice@pennysmart.org.uk
Freepost - PENNYSMART

Pennysmart CIC, Free-to-client money, debt and benefit advice and casework service provider, authorised by the FCA No. 618817, members of AdviceUK and licensed DRO intermediaries.

We excel in interventions with the most vulnerable/excluded in our communities, working with social landlords, charitable trusts and local authorities. Pennysmart CIC can accept support worker referrals from those that struggle to access existing services.



Unit 59-60 The Business Centre, Minerva Avenue,
Chester, Flintshire CH1 4QL.



Date:	Client First Name:
Organisation:	Client Last Name:
Referring Officer:	Client Tel No:
Referring Officer Tel No:	Client Email:
Has Client consented to referral?	Address:
Client's Preferred Language:	
Does Client have any communication needs? For example Large print etc.	Postcode:
If yes are they happy to share? YES NO	
Reason for Referral	Happy to be contacted by: (please circle) Email Text Mobile Landline If mobile please confirm they are happy to receive a text. YES NO
Partner: YES NO	Preferred contact time:
Does client have a Support worker?	Support Worker informed referral made?
Background notes	If resident has rent arrears please request their permission to share the following data with Pennysmart. Current rent: Tenure type: Balance on account: HB entitlement: Permission to share data granted:

Pennysmart CIC is a not for profit social enterprise that contracts with community facing organisations to deliver free independent, confidential money, debt & benefits advice services to those struggling to manage their money.

Pennysmart CIC Unit 59-60 The Business Centre Minerva Ave Chester CH1 4QL Tel: 01244 651 210

Return to Freepost PENNYSMART or advice@pennysmart.org.uk