

Factsheet C33: Transferring your money

If you are considering changing how you manage your money, whether this is from holding your own money to using Equal Lives' Supported Account service or vice versa, then this factsheet should make the transition as easy as possible.

Transferring from holding your own funds to Equal Lives holding funds

If you want Equal Lives to hold your funds as you no longer wish to hold your own, the first thing you have to do is to get into contact with one of our Finance Officers. They will take your details and send you our Terms and Conditions and Service Agreements. You need to sign and return these as we can't do anything until you agree to these. You need to contact Norfolk County Council's Direct Payment Team on 01603 638170 to let them know where they should send any future regular payments.

When we receive your signed agreements we will be in contact to set up your supported account. You will then need to send any funds you have remaining in your bank account to us at Equal Lives. You can do this by;

- Bank transfer, our details are;
Account name: Norfolk Coalition of Disabled People
Bank name: Co-op Bank, PO Box 250, Delf House, Skelmersdale
Sort code: 08-92-99 / Account number: 65069581
- Cheque made payable to NCODP

Note: In both instances you need to quote: **(Reference, Surname, First name)**
Your reference is your cost centre number for your Equal Lives supported account. If you do not know this, please contact us on 01508 491210.



Transferring from Equal Lives holding funds to you holding funds

If you no longer want Equal Lives to hold your funds and wish to do this yourself, the first thing you need to do is to contact one of our Finance Officers. They can explain the process; however we do need your authorisation in writing to release your funds. You are required to give us four weeks' notice as stated in your terms and conditions.

We need the following information:

- Your name, address and reference number
- Your bank details (for money transfer) / or request for a cheque
- Your signature to authorise release of funds

You are also required to contact Norfolk County Council's Direct Payment Team on 01603 638170 to inform them where they need to send any future regular payments to.

Once we have received your written authorisation we will send you the balance of your funds along with your final monitoring statement (when this is due). We will inform our Business Support team, who will work out any refunds due to you if your service finishes within the year.

Note: In both instances you need to quote: **(Reference, Surname, First name)**
Your reference is your cost centre number for your Equal Lives supported account. If you do not know this please contact us on 01508 491210.

If you require further information or would like this factsheet in an alternative format you can contact us by calling: 01508 491210, by emailing: info@equallives.org.uk, or by writing to: Equal Lives, 15 Manor Farm Barns, Fox Road, Framingham Pigot, Norfolk, NR14 7PZ.

