Department for Work and Pensions (DWP) Appointee Account

What is a Department for Work and Pensions (DWP) appointee?

A DWP appointee is an individual who has been given the legal right to manage another person’s benefits money. We refer to this individual as a Third Party. The person receiving state benefits may be unable to manage their own financial affairs for a range of reasons. The appointee would have full responsibility for making claims and managing spending. You’ll find more information on becoming a DWP appointee on the gov.uk and Department for Work and Pensions websites. You can find our useful links page at hsbc.co.uk/help/life-events/third-party-mandate.

Who can become an appointee?

If you know someone who needs help claiming and managing their benefits because they are mentally incapable or severely disabled, then the website gov.uk has information on how to get in touch with the DWP. If you are the Appointee, for more information, see the Guide for Appointees on the web page of the Department for Work and Pensions at gov.uk/become-appointee-for-someone-claiming-benefits.

> For other ways to assist someone with their money, visit hsbc.co.uk/help/life-events/assisting-someone-with-their-money.

What important information do I need to know?

As an appointee you can only manage the other party's benefits money. If you want to manage funds that are not from benefits or government pension you may have to apply for a Court of Protection Order.

When the customer dies, the authority of the appointee is cancelled and the balance of the appointee account will form part of the deceased customer's estate.

In the instance where the Appointee dies, the appointment is revoked and the appointee's authority is cancelled immediately.

How do I register my appointment with HSBC?

You should obtain BF57 letter as the written confirmation of your appointment from the DWP and register your appointment in branch.

- You may need to supply suitable documents proving your identity and address.
- We can open an HSBC Appointee Bank Account even if the person receiving benefits doesn't have an HSBC bank account.

HSBC Appointee Bank Account

Access and services for appointee:

- Debit card and Cash withdrawals.
- Making payments (i.e. bills).
- Hold a pay-in book.
- Access on-line and telephone banking.

Accessibility

If you need any of this information in a different format, please let us know. **This includes large print, braille, or audio.** You can speak to us using the live chat on our website, by visiting one of our branches, or by giving us a call.

There are also lots of other options available to help you communicate with us. Some of these are provided by third parties who are responsible for the service. These include a Text Relay Service and a British Sign Language (BSL) Video Relay Service. To find out more please get in touch. You can also visit: hsbc.co.uk/accessibility or: hsbc.co.uk/contact.

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