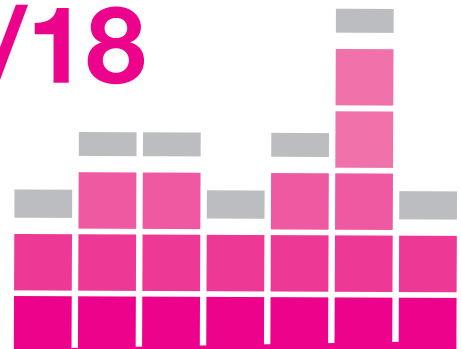


student finance wales
cyllid myfyrwyr cymru



Ariennir gan
Lywodraeth Cymru
Funded by
Welsh Government

Welsh Government Learning Grant Further Education 2017/18



Financial Details Form

www.studentfinancewales.co.uk/wglgfe

sound advice on

STUDENT FINANCE

How to complete the Financial Details Form

- Follow the instructions, we'll tell you what questions you need to answer and what ones you can skip.
- **Section 1** asks about you and who you live with, it will also tell you who needs to complete the rest of the form.
- **Section 2** and **Section 3** ask about your household income and, depending on your situation, either you (and your partner, if you have one) or your parent(s) will complete these.
- To complete **Section 3** your parent(s) or partner will need to have their National Insurance number to hand.
- **Section 4** contains your declarations which must be signed.
- You need to complete all of the questions you're asked to. Any missing information will delay your application.
- Where we ask for supporting documents – we will need it before your application can be fully processed. Any missing documents will delay your application.

Use the notes



Where you see this you should check the notes for specific **information** to help you complete a question or section.



Where you see this you need to send us **supporting documents**. Use the notes to find out exactly what you need to send. All documents you send must be originals, we can't accept copies. We will send your originals back to you.

Additional Help and Information

If you need any help to complete this form, please call us on **0300 200 4050** (Minicom: 0300 100 1693). Our website also has lots of helpful information about Welsh Government Learning Grant Further Education: **www.studentfinancewales.co.uk/wglgfe**

You can get forms and guides in Braille, large print or audio. Send your name and address along with a message telling us what format you require to: **brailleandlargefonts@slc.co.uk** or you can telephone us on **0141 243 3686**.

Note: this email address and telephone number can only deal with requests for alternative formats of forms and guides.

Section 1 Personal details


1.1 Student details

Forename

Surname

1.2 Has your name changed from the one shown above?

No – go to **1.3**

Yes – you need to send supporting documents,  read the notes to see what to send. Go to **1.3**

1.3 Has your marital status changed since your original application for this grant?

No – go to **1.5**


Yes – go to **1.4**

1.4 What is your new marital status?


Tick the box that best describes your status

I'm now single.


I'm now separated.

 You need to send supporting documents, read the notes to see what to send.

I'm now divorced.


 You need to send supporting documents, read the notes to see what to send.

My civil partnership has been dissolved.


 You need to send supporting documents, read the notes to see what to send.

I'm now a widow/surviving civil partner.

I'm now married.

 You need to send supporting documents, read the notes to see what to send.

I'm now in a civil partnership.

 You need to send supporting documents, read the notes to see what to send.

Section 1 Personal details (continued)

1.5 Tick any of the following statements that will apply to you on the first day of your course

- I'll be responsible for a child.
- I'll have supported myself financially for more than 3 years.
- I'll be living under the care of a Local Authority.
- I'll be, or will have been, married or in a civil partnership.
- I will have been estranged from both my parents for more than 12 months.
- Both my parents are deceased.

If you ticked any of the above.

Have you already sent supporting documents to prove each statement ticked?

- No** – Read the notes to see what you need to send, then go to **Section 2**. You are an **independent student**.
- Yes** – You are an **independent student**. Go to **Section 2**.

If you have not ticked any of the above.

You are a **dependent student**. Your parent(s) need(s) to complete **Section 3**, then **both** of you need to complete **Section 4**.

Section 2 Independent student financial details

Part A

Financial information for tax year 2017-18

2.1 Do you currently receive Income Support or Income-related Employment and Support Allowance?

No
 Yes

2.2 Do you currently receive Universal Credit?

No
 Yes

Part B

Household income

How to complete Part B

- Give an estimated amount for each income type listed below.
- If you will not receive income from any type listed below write 'n/a'.
- Estimates are for the tax year starting 6 April 2017 and ending 5 April 2018.
- If you leave any question blank in **Part B** we will not be able to process this application.

2.3 Estimated income from gross salaries and wages

£

2.4 Estimated income from self-employment

£

2.5 Estimated income from taxable social security benefits

£

2.6 Estimated taxable income from any other source

Specify each source below.

£

£

£

2.7 Give your total estimated household income

£

Add the estimates from questions **2.3**, **2.4**, **2.5** and **2.6** to give your total estimated household income.

Section 2 Independent student financial details (continued)

Part C

Household deductions

How to complete Part C

- Give an estimated amount for each deduction type listed below.
- If you will not pay a specific type of deduction listed in a question, write 'n/a'.
- Estimates for the tax year starting 6 April 2017 and ending 5 April 2018.
- If you leave any question blank in Part C we will not be able to process this application.

2.8 Estimated deductions towards private pension contributions

£

2.9 Estimated deductions towards Additional Voluntary Contributions (AVCs)

£

2.10 Estimated deductions towards wages for domestic help due to incapacity

£

2.11 Estimated deductions towards any other employment related expenses

£

2.12 Give your total estimated household deductions

£

Add the estimates from questions **2.8**, **2.9**, **2.10** and **2.11** to give your total estimated household income.

2.13 Give your overall estimated household income

£

This is your total estimated household income (**2.7**) minus your total estimated household deductions (**2.12**).

2.14 Do you have a partner?

By partner we mean your wife, husband, civil partner or co-habitant partner.

No – go to **Section 4** and sign your declaration.

Yes – Your partner needs to complete **Section 3**, then **both** of you need to complete **Section 4**.

Section 3 Financial details

Section 3 is divided into four parts. Read the following for a quick summary of each part.

Part A

Tell us your name and some other personal information including your National Insurance number.

Part B

Answer every question.

Part C

Only complete if instructed.

Part D

Answer every question.

How to complete this section

If you are a single parent of the student.


Enter your information as **Parent 1**, leave **Parent 2/student's partner** blank.

If there are two parents in the student's household.

Complete this section with information for both **Parent 1** and **Parent 2/student's partner**. Remember to tick the correct 'Relationship to student' box.

If you're the student's partner.

Enter your information as **Parent 2/student's partner**. Remember to tick the correct 'Relationship to student' box, leave **Parent 1** blank.

If you're self assessed – read page 5 of the notes for more information. 

If you're not self assessed – you can use your P60 to complete this section.

Data Sharing



We will share and check the details you give us with HM Revenue & Customs, allowing us to gain the most accurate information possible. This can only be done if you have a valid National Insurance (NI) number.

Part A

3.1 Personal details

Parent 1

First name	<input type="text"/>
Family name	<input type="text"/>
Date of birth	DAY MONTH YEAR <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
National Insurance number	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> go to Part B

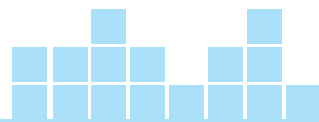
Parent 2/student's partner

First name	<input type="text"/>
Family name	<input type="text"/>
Date of birth	DAY MONTH YEAR <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Relationship to student (tick the box that's relevant to you)	<input type="checkbox"/> Parent 2 <input type="checkbox"/> Partner
National Insurance number	<input type="text"/> <input type="text"/> - <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> - <input type="text"/> go to Part B

Section 3 Financial details (continued)

Part B

Financial information for tax year 2015-16





How to complete Part B

- Answer every question.
- Where you answer 'Yes' to a question you must give gross income amounts.
- Any amounts given must be for the tax year starting 6 April 2015 and ending 5 April 2016.
- If you leave any question blank in Part B we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

Do I need to send any evidence of financial details with this application?

No, you don't need to send any evidence of your financial details now, but we may write out to request this at a later date.

What if my income has dropped since 15-16?

 If your household income has permanently changed since tax year 2015-16, refer to  page 5 of the notes for more information.

3.2 Were you in receipt of Income Support or Income-related Employment and Support Allowance?

Parent 1

Tax year 2015-16

- No
 Yes

Parent 2/student's partner

Tax year 2015-16

- No
 Yes

3.3 Were you in receipt of Universal Credits?

- No
 Yes

- No
 Yes

3.4 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

- No – go to **3.5**
 Yes – give details

- No – go to **3.5**
 Yes – give details

 Total income from salary/wages

£

£

 Total income from taxable state benefits

£

£

Total income from occupational pension(s)

£

£

Total income from private pension(s)

£

£

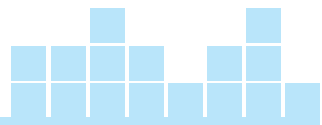
Section 3 Financial details (continued)

	Parent 1 Tax year 2015-16	Parent 2/student's partner Tax year 2015-16
3.5 Did you receive any income from a state retirement pension?	<input type="checkbox"/> No – go to 3.6 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 3.6 <input type="checkbox"/> Yes – give details
Total non-lump sum amount received	£ <input type="text"/>	£ <input type="text"/>
Total lump sum amount received	£ <input type="text"/>	£ <input type="text"/>
3.6 Did you receive any income from savings and investments?	<input type="checkbox"/> No – go to 3.7 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 3.7 <input type="checkbox"/> Yes – give details
i Total interest from UK banks, building societies and unit trusts	£ <input type="text"/>	£ <input type="text"/>
i Total income from UK life insurance gains, securities and partnerships	£ <input type="text"/>	£ <input type="text"/>
i Total income from UK investments and dividends	£ <input type="text"/>	£ <input type="text"/>
i Total income from foreign investment and dividends	£ <input type="text"/>	£ <input type="text"/>
3.7 Did you receive any taxable benefits in kind?	<input type="checkbox"/> No – go to 3.8 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 3.8 <input type="checkbox"/> Yes – give details
Total income from taxable benefits in kind	£ <input type="text"/>	£ <input type="text"/>
3.8 Did you receive any other income during tax year 2015-16 that you have not told us about in Part B ?	<input type="checkbox"/> No – go to Part D <input type="checkbox"/> Yes – go to Part C	<input type="checkbox"/> No – go to Part D <input type="checkbox"/> Yes – go to Part C

Section 3 Financial details (continued)

Part C

Any other income




How to complete Part C

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting 6 April 2015 and ending 5 April 2016.
- If you leave any question blank we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.


	Parent 1 Tax year 2015-16	Parent 2/student's partner Tax year 2015-16
3.9 Did you receive any income from self-employment?	<input type="checkbox"/> No – go to 3.10 <input type="checkbox"/> Yes – give details £ <input type="text"/> £ <input type="text"/>	<input type="checkbox"/> No – go to 3.10 <input type="checkbox"/> Yes – give details £ <input type="text"/> £ <input type="text"/>
3.10 Total taxable profit from businesses	£ <input type="text"/>	£ <input type="text"/>
3.10 Total taxable profit from partnerships	£ <input type="text"/>	£ <input type="text"/>
3.10 Did you receive any income as a Minister of religion?	<input type="checkbox"/> No – go to 3.11 <input type="checkbox"/> Yes – give details £ <input type="text"/>	<input type="checkbox"/> No – go to 3.11 <input type="checkbox"/> Yes – give details £ <input type="text"/>
3.10 Total taxable income minus expenses that are not included on your P60 or P11D	£ <input type="text"/>	£ <input type="text"/>
3.11 Did you receive any other taxable income or lump sums?	<input type="checkbox"/> No – go to 3.12 <input type="checkbox"/> Yes – give details £ <input type="text"/>	<input type="checkbox"/> No – go to 3.12 <input type="checkbox"/> Yes – give details £ <input type="text"/>
Total income received	£ <input type="text"/>	£ <input type="text"/>
3.12 Did you receive any income from property lettings?	<input type="checkbox"/> No – go to 3.13 <input type="checkbox"/> Yes – give details £ <input type="text"/>	<input type="checkbox"/> No – go to 3.13 <input type="checkbox"/> Yes – give details £ <input type="text"/>
Total income received	£ <input type="text"/>	£ <input type="text"/>

Section 3 Financial details (continued)

3.13 Did you receive any income from UK trusts?



Parent 1	Parent 2/student's partner
Tax year 2015-16	Tax year 2015-16
<input type="checkbox"/> No – go to 3.14	<input type="checkbox"/> No – go to 3.14
<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
£ <input type="text"/>	£ <input type="text"/>

Total income received

3.14 Did you receive any foreign income?



<input type="checkbox"/> No – go to 3.15	<input type="checkbox"/> No – go to 3.15
<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
£ <input type="text"/>	£ <input type="text"/>

Total income received

3.15 Did you receive any income from an overseas pension?


<input type="checkbox"/> No – go to 3.16	<input type="checkbox"/> No – go to 3.16
<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
£ <input type="text"/>	£ <input type="text"/>

Total income received

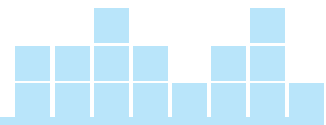
3.16 Did you receive any other overseas income and gains?


<input type="checkbox"/> No – go to Part D	<input type="checkbox"/> No – go to Part D
<input type="checkbox"/> Yes – give details	<input type="checkbox"/> Yes – give details
£ <input type="text"/>	£ <input type="text"/>
go to Part D	go to Part D

Total income received


Section 3 Financial details (continued)

Part D Deductions



How to complete Part D

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** deduction amounts.
- Any amounts given must be for the tax year starting 6 April 2015 and ending 5 April 2016.
- If you leave any question blank in **Part D** we will not be able to process this application.
- If you don't receive a specific type of deduction listed in a question, write 'n/a'.

	Parent 1 Tax year 2015-16	Parent 2/student's partner Tax year 2015-16
3.17 Did you pay any private pension contributions? Total amount you paid	<input type="checkbox"/> No – go to 3.18 <input type="checkbox"/> Yes – give details £ <input type="text"/>	<input type="checkbox"/> No – go to 3.18 <input type="checkbox"/> Yes – give details £ <input type="text"/>
3.18 Did you pay any Additional Voluntary Contributions (AVCs)? Total amount you paid	<input type="checkbox"/> No – go to 3.19 <input type="checkbox"/> Yes – give details £ <input type="text"/>	<input type="checkbox"/> No – go to 3.19 <input type="checkbox"/> Yes – give details £ <input type="text"/>
3.19  Did you have any allowable expenses on which you claimed tax relief? Total amount on which you claimed tax relief	<input type="checkbox"/> No – go to Section 4 <input type="checkbox"/> Yes – give details £ <input type="text"/> go to Section 4	<input type="checkbox"/> No – go to Section 4 <input type="checkbox"/> Yes – give details £ <input type="text"/> go to Section 4

Section 4 Declarations

How to complete Section 4.

If you are an independent student with no partner.

Complete the Student Declaration below, leave the Parent/Partner Declaration blank.

If you are an independent student with a partner.

You complete the Student Declaration, your partner needs to complete the Parent 2/student's partner Declaration below.

If you are a dependent student in a single parent household.

You complete the Student Declaration, the parent who completed Section 3 needs to complete the Parent 1 Declaration.

If you are a dependent student in a two parent household.

You complete the Student Declaration, the parent who completed Section 3 as Parent 1 needs to complete the Parent 1 Declaration and the parent who completed Section 3 as Parent 2 needs to complete the Parent 2/student's partner Declaration.

Student Declaration

By signing this declaration you are confirming that:

- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you understand that any attempt to dishonestly obtain this grant shall be treated as fraud and may result in criminal and/or civil proceedings against you;
- you have read and understood the Data Protection Statement included on page 11 of the accompanying notes; and
- you have read and understood these statements.

Student full name (in BLOCK CAPITALS)

Today's date

DAY			-	MONTH			-	YEAR				

Student signature

Parent/Partner Declaration

By signing and dating this declaration you confirm that:

- the information given on this form is correct and complete to the best of your knowledge and belief;
- you understand that any attempt to dishonestly obtain this grant shall be treated as fraud and may result in criminal and/or civil proceedings against you;
- you have read and understood the Data Protection Statement included on page 11 of the accompanying notes; and
- you have read and understood these statements.

Parent 1

Full name (in BLOCK CAPITALS)

Signature

Today's date

DAY			-	MONTH			-	YEAR				

Parent 2/student's partner

Full name (in BLOCK CAPITALS)

Signature

Today's date

DAY			-	MONTH			-	YEAR				

Where do I send my completed form and documents?

Make sure you've fully completed the form, signed and dated the declaration(s) and included all of the documents we need and send it to:

**Student Finance Wales FE Customer Services
PO Box 5597
Glasgow
G52 9BS**

Check the postage

Make sure that your completed application and all evidence are weighed and the postage costs are fully paid.

Remember to ask for proof of postage!

