

Education Maintenance Allowance (EMA) 2020/21



Financial Details Form



www.studentfinancewales.co.uk/ema

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** will ask about your household financial details. Depending on your situation, either your parent(s)/guardian(s) or you (and your partner, if you have one) will need to complete this section. Whoever completes this section will need their National Insurance number to hand.
 - **Section 3** contains your agreements 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 evidence – we will need it before your application can be fully processed. Any missing evidence will delay your application.
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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 icon, it means that you need to send **supporting evidence**. These notes will tell you exactly what we need from you. We will accept **photocopies** of your evidence.

How we process your data

To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 9 of the accompanying notes.

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 EMA: **www.studentfinancewales.co.uk/ema**

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 Student details

1.1 Customer Reference Number

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1.2 Student details

Forename

Surname

1.3 Do you live with your parents?

Yes – your parent(s)/guardian(s) need to complete **Section 2** then both of you need to complete **Section 3**.

No – you (and your partner, if you have one) need to complete **Section 2** then both of you need to complete **Section 3**.

Section 2 Financial details

Part A

Section 2 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.

Who completes this section?

Question 1.3 told you who needs to complete this section for your application.

How to complete this section

If you are a single parent/guardian of the student

Enter your information as Person 1, leave Person 2 blank.

If there are two parents/guardians in the student's household


Complete this section with information for both Person 1 and Person 2.

If you're an independent student with a partner

Enter your information as Person 1, your partner needs to enter their information as Person 2.

If you're an independent student without a partner

Enter your information as Person 1, leave Person 2 blank.

If you're self assessed – read page 3 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. This information will be used to work out if the student is eligible to get EMA based on household income. To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 9 of the accompanying notes.

2.1 Personal details

Person 1

Relationship to student (if you're the student write n/a)

Forename

Surname

Please provide your NI number below

 - -

Date of birth

Day Month Year

 - -

[go to Part B](#)

Person 2

Relationship to student

Forename

Surname

Please provide your NI number below

 - -

Date of birth

Day Month Year

 - -

[go to Part B](#)

Section 2 Financial details (continued)

Part B

Financial information for tax year 2018-19

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 2018** and ending **5 April 2019**.
- 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 2018-19?

i If your household income has permanently changed since tax year **2018-19**, refer to page 3 of the notes **e** for more information.

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

Person 1
Tax year 2018-19

- No
 Yes

Person 2
Tax year 2018-19

- No
 Yes

2.3 Were you in receipt of Universal Credit?

Tax year 2018-19

- No
 Yes

Tax year 2018-19

- No
 Yes

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

Tax year 2018-19

- No – go to **2.5**
 Yes – give details

Tax year 2018-19

- No – go to **2.5**
 Yes – give details

i Total income from salary/wages

£

£

i Total income from taxable state benefits

£

£

Total income from occupational pension(s)

£

£

If you receive a lump sum pension, only declare the amount you received that you paid tax on.

Total income from private pension(s)

£

£

If you receive a lump sum pension, only declare the amount you received that you paid tax on.

Section 2 Financial details (continued)

2.5 Did you receive any income from a state retirement pension?

Total non-lump sum amount received

Total lump sum amount received

Person 1

Tax year 2018-19

No – go to **2.6**

Yes – give details

£

£

Person 2

Tax year 2018-19

No – go to **2.6**

Yes – give details

£

£

2.6 Did you receive any income from savings and investments?



2.6 Total interest from UK banks, building societies and unit trusts

2.6 Total income from UK life insurance gains, securities and partnerships

2.6 Total income from UK investments and dividends

2.6 Total income from foreign investment and dividends

Tax year 2018-19

No – go to **2.7**

Yes – give details

£

£

£

£

Tax year 2018-19

No – go to **2.7**

Yes – give details

£

£

£

£

2.7 Did you receive any taxable benefits in kind?



Total income from taxable benefits in kind

Tax year 2018-19

No – go to **2.8**

Yes – give details

£

Tax year 2018-19

No – go to **2.8**

Yes – give details

£

2.8 Did you receive any other income during tax year 2018-19 that you have not told us about in **Part B**?

Tax year 2018-19

No – go to **Part D**

Yes – go to **Part C**

Tax year 2018-19

No – go to **Part D**

Yes – go to **Part C**








Section 2 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 2018** and ending **5 April 2019**.
- 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'.

	Person 1	Person 2
2.9  Did you receive any income from self-employment?	Tax year 2018-19 <input type="checkbox"/> No – go to 2.10 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 2.10 <input type="checkbox"/> Yes – give details
 Total taxable profit from businesses	£ <input type="text"/>	£ <input type="text"/>
 Total taxable profit from partnerships	£ <input type="text"/>	£ <input type="text"/>
2.10  Did you receive any income as a Minister of religion?	Tax year 2018-19 <input type="checkbox"/> No – go to 2.11 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 2.11 <input type="checkbox"/> Yes – give details
 Total taxable income minus expenses that are not included on your P60 or P11D	£ <input type="text"/>	£ <input type="text"/>
2.11  Did you receive any other taxable income or lump sums?	Tax year 2018-19 <input type="checkbox"/> No – go to 2.12 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 2.12 <input type="checkbox"/> Yes – give details
Total income received	£ <input type="text"/>	£ <input type="text"/>
2.12  Did you receive any income from property lettings?	Tax year 2018-19 <input type="checkbox"/> No – go to 2.13 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 2.13 <input type="checkbox"/> Yes – give details
Total income received	£ <input type="text"/>	£ <input type="text"/>

Section 2 Financial details (continued)

2.13 Did you receive any income from UK trusts?



Person 1

Tax year 2018-19

No – go to **2.14**

Yes – give details

£

Total income received

Person 2

Tax year 2018-19

No – go to **2.14**

Yes – give details

£

2.14 Did you receive any foreign income?



Tax year 2018-19

No – go to **2.15**

Yes – give details

£

Total income received

Tax year 2018-19

No – go to **2.15**

Yes – give details

£

2.15 Did you receive any income from an overseas pension?



Tax year 2018-19

No – go to **2.16**

Yes – give details

£

Total income received

Tax year 2018-19

No – go to **2.16**

Yes – give details

£

2.16 Did you receive any other overseas income and gains?



Tax year 2018-19

No – go to **Part D**

Yes – give details

£

Total income received

Tax year 2018-19

No – go to **Part D**

Yes – give details

£

go to **Part D**

go to **Part D**

Section 2 Financial details (continued)

Part D

Income 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 2018** and ending **5 April 2019**.
- 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'.

2.17 Did you pay any private pension contributions?

Don't include any payments to a workplace pension.

Total amount you paid

Person 1

Tax year 2018-19

No – go to **2.18**

Yes – give details

£

Person 2

Tax year 2018-19

No – go to **2.18**

Yes – give details

£

2.18 Did you pay any Additional Voluntary Contributions (AVCs)?

Total amount you paid

Tax year 2018-19

No – go to **2.19**

Yes – give details

£

Tax year 2018-19

No – go to **2.19**

Yes – give details

£

2.19 Did you have any allowable expenses on which you claimed tax relief?



Total amount on which you claimed tax relief

Tax year 2018-19

No – go to **Section 3**

Yes – give details

£

go to **Section 3**

Tax year 2018-19

No – go to **Section 3**

Yes – give details

£

go to **Section 3**

Section 3 Agreements

How to complete Section 3.

If you are an independent student with no partner.

Complete the Student Agreement below, leave the Parent/Guardian/Partner Agreement **blank**.

If you are an independent student with a partner.

You complete the Student Agreement, your partner needs to complete the Parent/Guardian/Partner Agreement as **Person 2**.

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

You complete the Student Agreement, the parent who completed Section 3 needs to complete the Parent/Guardian/Partner Agreement as **Person 1**.

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

You complete the Student Agreement, and your parents need to complete **both** Person 1 and Person 2 of the Parent/Guardian/Partner Agreement.

Student Agreement

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 EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- where you have provided any personal information in relation to a third party, you have informed them of this.

Student full name (in BLOCK CAPITALS)

Today's date

Day			-	Month			-	Year				

Student signature

Parent/Guardian/Partner Agreement

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 EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- you have read and understood these statements.

Person 1

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				

Person 2

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				

3 things to remember



1 Get your EMA!

Make sure you've answered all the questions and sections we need you to and then return your fully completed form as soon as possible.



2 Check the postage

Make sure that you've included all evidence with your completed application, had it weighed and paid the correct postage costs.

Remember to ask for proof of postage!



3 Send the form

Return your completed form to the address below:

EMA Wales Customer Services
PO Box 5596
Glasgow
G52 9BR