



## After I have sent you my completed form, do I need to do anything else?

Yes, but not just now. After tax year 2021-22 has ended, we will contact you and ask you to confirm, with evidence, your actual earnings for that tax year.

These evidence items will be the same documents that you send to, or receive from, HM Revenue & Customs. For example, a P60, SA200 or Self Assessed Tax Return.

If your actual income is different from your estimates we may adjust the amount of student finance awarded. If we have paid the student(s) too much we may have to recover student finance from them.

## ▶ Section A - tax credits and income support

<b>Q1</b>	Does your tax year end on 5 April 2022?	<b>Person 1</b>	<b>Person 2</b>
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	If no, when does it end?	Day <input type="text"/> <input type="text"/> / Month <input type="text"/> <input type="text"/> / Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Day <input type="text"/> <input type="text"/> / Month <input type="text"/> <input type="text"/> / Year <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
If your tax year ends on a date other than 5 April 2022, please provide us with information for your tax year that will end during the academic year 2021/22.			
<b>Q2</b>	Will or do you expect to receive Working Tax Credits or Child Tax Credits?	<b>Person 1</b>	<b>Person 2</b>
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Q3</b>	Will you receive Income Support or Universal Credit?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## ▶ Section B - your financial information

**How to answer the questions in this section:**

- If you answer 'Yes' to any of these questions you will need to provide the **total** amount of gross income you expect to receive for that income type.
- The total amount should include all earnings for the full tax year. For example, if you were made redundant part-way through the year, you need to include earnings from 6 April 2021 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2022.
- For pension payment questions, please tell us the amount of the pension you expect to receive from the first month you receive it until the end of the tax year.
- **If you answer 'No'** to any question, you are telling us that you do not expect to receive any income from that particular income type.

<b>Q1</b>	Do you expect to receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	<b>Person 1</b>	<b>Person 2</b>
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<b>a</b> Total expected income from salary / wages	£ <input style="width: 100%;" type="text"/>	£ <input style="width: 100%;" type="text"/>
	<b>b</b> Total expected income from taxable state benefits	£ <input style="width: 100%;" type="text"/>	£ <input style="width: 100%;" type="text"/>
	<b>c</b> Total expected taxable income from occupational pension(s) <small>If you receive a lump sum pension, only declare the amount you received that you paid tax on.</small>	£ <input style="width: 100%;" type="text"/>	£ <input style="width: 100%;" type="text"/>
	<b>d</b> Total expected taxable income from private pension(s) <small>If you receive a lump sum pension, only declare the amount you received that you paid tax on.</small>	£ <input style="width: 100%;" type="text"/>	£ <input style="width: 100%;" type="text"/>

**n** If you are in receipt of taxable state benefits, only include the following benefits in your total above:

- Bereavement Allowance
- Carer's Allowance
- Contribution based Employment and Support Allowance
- Graduated retirement benefit
- Industrial Death Benefit
- Incapacity Benefit (only include the amount received after 28 weeks of incapacity)
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

Don't include income from any other benefits, including Universal Credit.

## Section B - your financial information

Continued

	Person 1	Person 2
<b>Q2</b> Do you expect to receive any income from a State Retirement Pension?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>a</b> Total expected non-lump sum amount	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>b</b> Total expected lump sum amount	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>Q3</b> Do you expect to receive any income from savings and investments?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>n a</b> Total expected UK interest from UK banks, building societies and unit trusts	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>b</b> Total expected income from other savings and investments	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>c</b> Total income from UK investments and dividends	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>d</b> Total income from foreign investment and dividends	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>n</b> Gross UK interest (before tax has been deducted) You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.		
<b>Q4 n</b> Do you expect to receive any income from taxable benefits in kind?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total expected income from taxable benefits in kind	<input style="width: 100%;" type="text" value="£"/>	<input style="width: 100%;" type="text" value="£"/>
<b>n</b> Taxable benefits in kind are other benefits that you are entitled to, but do not form part of your salary. For example, a fuel allowance or company car.		
<b>Q5</b> Do you expect to receive any other income during the 2021-22 tax year that you <b>haven't</b> yet told us about?	<input type="checkbox"/> Yes - Go to Section C  <input type="checkbox"/> No - Go to Section D	<input type="checkbox"/> Yes - Go to Section C  <input type="checkbox"/> No - Go to Section D

## Section C - other income

**Q1** Do you expect to receive any income from self-employment?

**Person 1**  
 Yes  No

**Person 2**  
 Yes  No

**a** Total adjusted profit from businesses

£

£

**b** Total adjusted profit from partnerships

£

£

**Q2** Do you expect to receive any income as a Minister of religion?

Yes  No

Yes  No

Total expected income amount (minus expenses that would not normally show on a P60 or P11D)

£

£

**Q3** <sup>n</sup> Do you expect to receive any income from lump sums or from other taxable income sources?

Yes  No

Yes  No

Total expected income from lump sums or other taxable income sources.

£

£

<sup>n</sup> For example, money received as compensation or from redundancy. You must include the full amount of your redundancy payment, even if you don't expect to pay tax on it.

**Q4** Do you expect to receive any income from property lettings?

Yes  No

Yes  No

Total expected income from property lettings

£

£

**Q5** <sup>n</sup> Do you expect to receive any income from UK trusts?

Yes  No

Yes  No

Total expected income from UK trusts.

£

£

<sup>n</sup> For example, payments from settlor-interested trusts and income from UK estates.

**Q6** Do you expect to receive any foreign income?

Yes  No

Yes  No

Total expected foreign income

£

£

**Q7** Do you expect to receive any income from an overseas pension?

Yes  No

Yes  No

Total expected income from an overseas pension

£

£

**Q8** Do you expect to receive any other overseas income and gains?

Yes  No

Yes  No

Total expected other overseas income and gains

£

£

## Section D - income deductions

**Q1** Do you expect to pay any private pension contributions?

**Person 1**

Yes  No

£

**Person 2**

Yes  No

£

Total expected private pension contributions

**Q2** Do you expect to pay any Additional Voluntary Contributions (AVCs)?

Yes  No

£

Yes  No

£

Total expected AVCs

**Q3** Do you expect to have any allowable expenses on which you will claim tax relief?

Yes  No

£

Yes  No

£

Total expected allowable expenses on which you will claim tax relief

## Declaration

**Make sure you sign the declaration in ink. Digital signatures won't be accepted.**

To find out how we'll use the information you provide go to [www.studentfinancewales.co.uk/privacynotice](http://www.studentfinancewales.co.uk/privacynotice) to read our Privacy Notice before signing this form.

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.

**This application for financial support may be delayed unless you sign and date this declaration.**

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not, I understand the student may not receive financial support, any support they have had may be withdrawn and I could be prosecuted.
- I agree to provide any further information in relation to the applicant's application for financial support as may reasonably be required, and I agree to provide immediate notice of, and details in relation to, any change in circumstances that might in any way affect this application for financial support.

**Person 1**

Your full name (in BLOCK CAPITALS)

Your signature

Date   /   /

**Person 2**

Your full name (in BLOCK CAPITALS)

Your signature

Date   /   /