 **Education  
Maintenance  
Allowance (EMA)  
2026/27**

 **Financial Details  
Form**

 [www.studentfinancewales.co.uk/ema](http://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.

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## 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.

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### Additional Help and Information

If you need any help to complete this form, please call us on **0300 200 4050**.

Our website also has lots of helpful information about EMA: [www.studentfinancewales.co.uk/ema](http://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](mailto: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.

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# 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 (continued)

## Part B

### Data sharing and you


**If you have a National Insurance (NI) number** you must provide it below. We will use your NI number to check your income for the 2024-25 tax year with HM Revenue & Customs. This allows us to gain the most accurate financial information.

**If you do not have an NI number** then we will need full evidence of your financial details for the 2024-25 tax year.

### 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. You only need to send us evidence if we request it.

#### What if my income has dropped since 2024-25?

 If your household income has permanently changed since tax year 2024-25, refer to page 16 of the notes for more information.

	Person 1 Tax year 2024-25	Person 2 Tax year 2024-25
<b>2.2a</b> Do you have an NI number	No - go to <b>8.7</b>  Yes	No - go to <b>2.7</b>  Yes
<b>2.2b</b> Provide NI number	<input type="text"/>  go to <b>2.3</b>	<input type="text"/>  go to <b>2.3</b>
<b>2.3</b> Did you complete a self assessment tax return in the UK for the 2024-25 tax year	Tax year 2024-25 No - go to <b>2.6</b>  Yes - go to <b>2.4</b>	Tax year 2024-25 No - go to <b>2.6</b>  Yes - go to <b>2.4</b>
<b>2.4</b> Did you receive any UK income that was under a tax threshold?	Tax year 2024-25 No - go to <b>2.5</b>  Yes – go to <b>Part C</b>	Tax year 2024-25 No - go to <b>2.5</b>  Yes – go to <b>Part C</b>
<b>2.5</b> Did you receive any income in tax year 2024-25 from overseas that wasn't declared to HMRC?	Tax year 2024-25 No - go to <b>Part E</b>  Yes – go to <b>Part D</b>	Tax year 2024-25 No - go to <b>Part E</b>  Yes – go to <b>Part D</b>
<b>2.6</b> HMRC will tell us any income you received in the UK from employment, benefits and/or pensions. Did you receive any other income?	Tax year 2024-25 No - go to <b>Part E</b>  Yes – go to <b>Part C</b>	Tax year 2024-25 No - go to <b>Part E</b>  Yes – go to <b>Part C</b>

## Section 2 Financial details (continued)

**2.7** Did you have any income during the 2024-25 tax year?

Tax year 2024-25

No - go to **Part E**

Yes – go to **Part C**

Tax year 2024-25

No - go to **Part E**

Yes – go to **Part C**

### Part C

#### Other income for tax year 2024-25

##### Instructions

- Please give your financial details for the tax year from **6 April 2024 to 5 April 2025**.
- Answer 'Yes' or 'No' to question **8.8**, if you answer 'Yes' please provide the income amount.
- If you answer 'No' to question **8.8**, this means you are telling us that you did not receive any income from that particular income type in tax year 2024-25.

**2.8** Did you receive any income in the UK that HMRC doesn't know about?



##### Person 1

Tax year 2024-25

No – go to **2.9**

Yes – give details

##### Person 2

Tax year 2024-25

No – go to **2.9**

Yes – give details

**a** Total income from savings and investments

Only tell us about the amount of interest/ income you gained from savings and investments during the tax year, not the actual amount of savings or invested sums you had.

£

£

**b** Total income from property lettings, land or rent

This includes the Rent a Room Scheme.

£

£

**c** Total income from casual or freelance earning(s)

This includes any supplementary sources of income.

£

£

**2.9** Did you receive any income from overseas that you haven't already told HMRC about?

Tax year 2024-25

No - go to **Part E**

Yes – go to **Part D**

Tax year 2024-25

No - go to **Part E**

Yes – go to **Part D**



# Section 2 Financial details (continued)

## Part E Income deductions

### Instructions

- Please give your financial details for the tax year from **6 April 2024 to 5 April 2025**.
- Answer 'Yes' or 'No' to questions **8.12** and **8.13**, if you answer 'Yes' please provide the income amount.
- Some workplace pensions are called 'occupational', 'works', 'company' or 'work-based' pensions, we do not need to know about these.
- Any deductions declared in this section will reduce your household income figure when calculating the student(s) entitlement (as long as evidence is provided).

**2.12** Did you pay any private pension contributions?



Total amount you paid

#### Person 1

Tax year 2024-25

No – go to **8.13**

Yes – give details

£

#### Person 2

Tax year 2024-25

No – go to **8.13**

Yes – give details

£

**2.13** Did you pay any Additional Voluntary Contributions (AVCs)?

Total amount you paid

Tax year 2024-25

No – go to **Section 9**

Yes – give details

£

Tax year 2024-25

No – go to **Section 9**

Yes – give details

£

# 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**