


## Applying for student finance based on household income form

### About this form

#### Who should complete this form?

Complete this form if you want to change your student finance application to be based on your household income.

 Where you see this icon it means we need you to give supporting evidence. Details of the evidence needed will be shown where the icon appears.

If you leave any question blank we won't be able to process your application. If a question doesn't apply to you, enter 'None' or 'N/A' as the answer.

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 completing this form.

## Section 1 Your personal details

### 1.1 Customer Reference Number

### 1.2 Personal details

Title

Mr  Mrs  Miss  Ms  Mx  
 Professor  Doctor

Forename(s)

Surname

Date of birth

Day                      Month                      Year  
 /  /




## Section 2 Dependent or independent student




This section determines whether you are a dependent or an independent student. This is important as it establishes whose income we need to take into account from your household before we calculate your entitlement.

If you answer yes to any of the following questions, you may need to send evidence. Please see the table on **page 6** to find out what evidence you can send.

- 2.1 Will you be aged 24 or under on the first day of the first academic year of your course and at any point from the age of 14 to the first day of the first academic year of the course, you:**
- have not been under the legal care of your parents for 13 weeks or more; or
  - have been under a special guardianship order; or
  - have been in the custody or legal care of, or have been given accommodation by a Local Authority for 13 weeks or more

- 2.2 Will you be aged 25 or over on the first day of the academic year?**





- No – go to **2.2**
- Yes – you **don't** need to provide details of your household income. Check the table below to see what evidence you need to send then sign the declaration on **page 10** 

- No – go to **2.3**
- Yes – what will your marital status be at the start of the academic year?
- Married/civil partnership  
Please give the date of marriage/  
civil partnership
- Day                      Month                      Year
- /   /
- Living with a partner
- Separated 
- Divorced/dissolved civil partnership 
- Widowed/surviving civil partner 
- Single

If you're **living with a partner or married/in a civil partnership**, your partner must complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

## Section 2 Dependent or independent student – continued


**2.3 Are you or have you been married or in a civil partnership before the first day of the first academic year?**

- No – go to **2.4**
- Yes – what will your marital status be at the start of the current academic year?
- Married/civil partnership   
Day                      Month                      Year  
  /   /
- Go to Section 3.**
- Separated – go to **2.3.1** 
- Divorced/dissolved civil partnership – go to **2.3.1** 
- Widowed/surviving civil partner – go to **2.3.1** 

**2.3.1 Who will you live with?**

- Living with a partner – your partner needs to complete an ‘Assessment of Financial Circumstances Form’.  
They can download this from  
**[www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)**  
**Go to Section 3.**
- Single

**2.4 Will you have care of a person under the age of 18 on the first day of the academic year?**

- No – go to **2.5**
- Yes – Who will you live with?
-   Living with a partner – your partner needs to complete an ‘Assessment of Financial Circumstances Form’.  
They can download this from  
**[www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)**  
**Go to Section 3.**
- Single – go to **Section 3.**

## Section 2 Dependent or independent student – continued

**2.5** Have you supported yourself financially for a total of three years or more prior to the first day of the first academic year of your course?

No – go to **2.6**

Yes – Who will you live with?



Living with a partner – your partner needs to complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

Single – go to **Section 3.**

**2.6** Can your parents not be found or is it not reasonably practicable to get in touch with them?

No – go to **2.7**

Yes – Who will you live with?



Living with a partner – your partner needs to complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

Single – go to **Section 3.**

**2.7** Are your parents living outside the EU and it wouldn't be possible for them to send you money, or would assessing their financial circumstances would place them in jeopardy?

No – go to **2.8**

Yes – Who will you live with?



Living with a partner – your partner needs to complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

Single – go to **Section 3.**

## Section 2 Dependent or independent student – continued

**2.8** Are you irreconcilably estranged from (have no contact with) your parents and this will not change?

No – go to **2.9**

Yes – Who will you live with?



Living with a partner – your partner needs to complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

Single – go to **Section 3.**

**2.9** Are both your parents deceased?

No – go to **2.10**

Yes – Who will you live with?



Living with a partner – your partner needs to complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)  
**Go to Section 3.**

Single – go to **Section 3.**

## Section 2 Dependent or independent student – continued

Independent category	Evidence item(s)
<p>At any point from the age of 14 to the first day of the first academic year of the course, you:</p> <ul style="list-style-type: none"> <li>• have not been under the legal care of your parents for 13 weeks or more; or</li> <li>• have been under a special guardianship order; or</li> <li>• have been in the custody or legal care of, or have been given accommodation by a Local Authority for 13 weeks or more</li> </ul>	<p>Please provide one of the following:</p> <ul style="list-style-type: none"> <li>• care order confirmation documents;</li> <li>• a letter from 'Foyer' or other supported housing scheme; or</li> <li>• a letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.</li> </ul>
<p>I was married or in a civil partnership at the start of the academic year</p>	<p>If you are currently married or in a civil partnership, send your:</p> <ul style="list-style-type: none"> <li>• original marriage certificate; or</li> <li>• original civil partnership documentation.</li> </ul> <p>If you are now divorced or the civil partnership has been dissolved, send:</p> <ul style="list-style-type: none"> <li>• your decree absolute;</li> <li>• your dissolution order;</li> <li>• your final or conditional order; or</li> <li>• a letter from your solicitor confirming your status.</li> </ul>
<p>You have care of a child under 18</p>	<p>The child's/children's original birth certificate(s) and evidence that you have care of the child. For example, evidence that you are receiving Child Benefit, Child Tax Credit or the child element of Universal Credit.</p>
<p>You have supported yourself for 3 or more years</p>	<ul style="list-style-type: none"> <li>• P60s;</li> <li>• month 12 or Week 52/53 payslips;</li> <li>• statement of earnings from HM Revenue &amp; Customs (HMRC)</li> <li>• statement of earnings from employer; and/or</li> <li>• a letter from the local Jobcentre Plus/Department for Work &amp; Pensions (DWP) confirming the periods of any/all benefit entitlement received.</li> </ul>
<p>Your parents cannot be found or it is not reasonably practicable to get in touch with them</p>	<p>A letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. a Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.</p>
<p>Your parents live outside the EU and it wouldn't be possible for them to send you money, or assessing their financial circumstances would place them in jeopardy</p>	<p>A letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. a Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.</p>
<p>You are irreconcilably estranged from (have no contact with) your parents and this will not change</p>	<p>Please provide a signed and dated letter from a professional person, i.e a Doctor, Teacher or Social Worker, confirming the following:</p> <ul style="list-style-type: none"> <li>• their relationship to you;</li> <li>• the length of time they have known you;</li> <li>• the reasons for your estrangement from your parents; and</li> <li>• if reconciliation is likely.</li> </ul>
<p>Both your parents are deceased</p>	<p>Send the death certificate(s) of your parent(s).</p>

## Section 2 Dependent or independent student – continued

### 2.10 You are dependent on your parent(s) so you need to confirm who you normally live with, or have more contact with

The following family members count for the purposes of income assessment:

- your natural or adoptive parents (if both of them live with you); or
- your parent and their partner (if they have one).

Your parent's partner is defined as:

- your stepmother or stepfather; or
- your parent's same or opposite sex partner if they live together as if they were married or in a civil partnership.

Both parents – go to **Section 3**

One parent – what is their marital status?

Living with a partner

Separated

Divorced/dissolved civil partnership

Widowed/surviving civil partner

Single

**Go to Section 3.**

Your parent(s) must complete an 'Assessment of Financial Circumstances Form'. They can download this from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)

## Section 3 Your income and dependants

### Your Income

#### 3.1 Will you be receiving any unearned income during this academic year?

**Do include any:**

- bank or building society gross interest
- property, lettings or rent
- dividends or investments
- trusts or sponsorships
- any other payment received for attending the course (don't include income from Bursaries or Scholarships)

**Don't include any:**

- non-taxable state benefits
- earnings from full or part time work.
- Postgraduate Master's Finance payments
- payments you receive from parents under a covenant
- Teacher Training Bursaries
- Higher Education Bursaries
- scholarships
- Bounties paid by the armed forces to reservists
- disablement or invalidity payments

No – go to 3.2

Yes – estimate the total taxable unearned income, before deductions, that you expect to receive for this academic year

£

What is the source of this income?

### Payments from your employer

#### 3.2 Will you be employed during the academic year 2022/23?

No – go to 3.5

Yes

#### 3.3 Will your employer be specifically releasing you to attend your course for the academic year 2022/23?

No

Yes – how much will your employer pay you for time spent attending the course during this period?

£

#### 3.4 Will you or your employer pay any money into a pension fund on your behalf during the academic year 2022/23?

No

Yes – how much during this period?

£



## Section 3 Your income and dependants – continued

### Dependent Children

- 3.5 Will you have any children who will be wholly or mainly financially dependent on you during academic year 2022/23?**

**No**  
 **Yes – give details below**

#### Give details of the dependent children

If you need more space, use the additional notes at the back of this form or attach another piece of paper.

Child 1 full name

Relationship to you

Date of birth

Day                      Month                      Year  
 /  /

Child 2 full name

Relationship to you

Date of birth

Day                      Month                      Year  
 /  /

## Declaration

- I can 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 I may not receive financial support, and support I have had may be withdrawn and I could be prosecuted.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full.
- 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. Alternatively, you can request a copy by writing to the Student Loans Company Ltd (SLC) at 100 Bothwell Street, Glasgow, G2 7JD or by calling us on 0300 100 0494.

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

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"/>	<input type="text"/>	<input type="text"/>

## Checklist

Before returning this form, please make sure you have done the following:

- Answered all of the relevant questions  
If you have been asked to answer a question and haven't – we won't be able to accept your form.
- Included any relevant evidence
- Told any sponsor(s) you have that they must download and complete an 'Assessment of Financial Circumstances Form' from [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)
- Signed and dated the declaration
- Paid the correct postage

## Next steps

Once your form is fully complete and the declaration has been signed and dated, you should return it to:

**Student Finance Wales**  
**PO Box 211**  
**Llandudno Junction**  
**LL30 9FU**

Your parent(s) or partner may have received a separate form asking them to provide details about their income. This must also be completed and returned to us.

## Additional notes

If you're providing extra information clearly mark what Section and question the information is about.