

Application Form for New Students

The quickest and easiest way to apply is online at www.studentfinancewales.co.uk/pgfinance

About this form

- You only need to apply once for Postgraduate Master's Finance for the duration of your course.
- If you applied last year and are continuing your course this year, you don't need to complete this form. We'll contact you about your payments before the start of each year of your course.
- Only complete this form if you're starting a new course on or after **1 August 2020**.
- If your course started before this date and you didn't apply for funding last year, go to www.studentfinancewales.co.uk/pgfinance to get the 'Application for Continuing Students' form.
- We welcome applications in Welsh. This won't lead to a delay in our response.

Before you complete this form

You need to read the information at www.studentfinancewales.co.uk/pgfinance about Postgraduate Master's Finance. You can find more information about:

- who can get Postgraduate Master's Finance;
- how and when you'll be paid; and
- how you'll repay your loan and when you'll start repaying.

It's important that you read and understand all this information before you apply.

If you're not sure if your course is eligible for Postgraduate Master's Finance you should speak to your university.

You will need to have the 'Postgraduate Master's Finance Application for New Students Supporting Notes' to hand to complete this application form. Go to www.studentfinancewales.co.uk/pgfinance to download them.

Application deadline

The deadline for a one year course is nine months after the first day of your academic year.

For courses longer than this, the deadline is nine months after the first day of the final year of the course.

Privacy Notice

To find out how we'll use the information you provide go to www.studentfinancewales.co.uk/privacynotice to read our Privacy Notice before completing this form.



How to complete this form

- Follow the instructions, we'll tell you what questions you need to answer and which ones you can skip.
- You need to complete all of the questions you're asked to. Any missing information will delay your application.
- If we ask for supporting documents we'll need them before your application can be accepted. Any missing supporting documents will delay your application.

Use the supporting notes to help you complete your application



Where you see this icon it means there's additional information in the 'Postgraduate Master's Finance Application for New Students Supporting Notes'.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

Read the notes – if you don't answer a question or section correctly or you don't include the documents we need this will delay your payments.

You can find these notes at www.studentfinancewales.co.uk/pgfinance

Disabled Students' Allowances

You can apply for Disabled Students' Allowances (DSAs) if you have a disability which meets the definition of a disability under the Equality Act 2010, including a:

- long-term health condition;
- mental health condition;
- specific learning difficulty, for example: dyslexia.

DSAs are paid separately from any other student finance. They help you pay the extra costs you may have because of your disability. They don't have to be repaid. How much you get depends on your individual needs.

To apply or to find out more about DSAs go to www.studentfinancewales.co.uk/pgfinance

Additional help and information

For the most up-to-date information about Postgraduate Master's Finance you can:

- go to www.studentfinancewales.co.uk/pgfinance
- follow us on twitter at [@SF_Wales](https://twitter.com/SF_Wales)
- find us on [Facebook/SFWales](https://www.facebook.com/SFWales)
- watch our films at [YouTube/SFWFILM](https://www.youtube.com/SFWFILM)

If you can't find the information you need online you can call us on **0300 100 0494**.

All of our forms and guides are available in Braille, large print format or audio. If you need these, you can request them by emailing your name, address and details of the format you require to: brailleandlargefonts@slc.co.uk or call **0141 243 3686** (this number is only for alternative format requests).

It's important you read the following 5 things before applying for Postgraduate Master's Finance.

- 1 You can apply for support up to £17,489, made up of a grant and a loan. You will get 3 payments each academic year for the duration of your course.**
- 2 You'll be charged interest on your loan from the day you get your first payment.**
- 3 The interest rate is made up of the Retail Price Index (RPI) plus an additional 3%.**
- 4 You'll have to repay your loan, but only when you've left university and your income is over £21,000 a year.**
- 5 You'll repay 6% of your income over £21,000 towards your postgraduate loan.**

You'll repay this amount in addition to any repayments you're making towards any undergraduate student loans you already have.

Your information

The information you give during the application process will be used to assess your entitlement to student finance. It is your responsibility to ensure the information is correct. It is an offence to knowingly provide false information in this application.

You're now ready to apply for Postgraduate Master's Finance

Section 1 Your details

1.1 Personal details

Complete these details exactly as stated on your passport, birth certificate or ID card.



If your name has changed since your passport, birth certificate or ID card was issued you need to send us documents to show this. Read the notes to find out what to send.

Title

Mr Mrs Miss Ms Mx
 Doctor Professor

Forename(s)

Surname/family name

Any previous names you have been known by

Sex

Male Female

Date of birth

Day Month Year
 / /

1.2 Customer Reference Number

(if you have one)

Your Customer Reference Number is 11 digits long.

You'll have a Customer Reference Number if you've applied for student finance, or supported an application for someone else's student finance from any of the following:

- The Student Loans Company
- Student Finance England
- Student Finance Wales
- Student Finance NI

1.3 Place of birth

The name of the village, town or city.

1.4 Your nationality

If you have 'Stateless Persons' status please write Stateless in the text box.

1.5 UK National Insurance number



If you have previously worked in the UK you will find your National Insurance number on any of the following:

- your National Insurance number card or letter; or
- a payslip; or
- an Income Tax document such as P45 or P60.

Any payment of your loan will be withheld until you provide your National Insurance number, unless you're a European Union (EU) student.

We will share the National Insurance number you provide with the Department for Work and Pensions to confirm that it's valid, and with HM Revenue and Customs to allow us to collect your repayments.

Section 1 Your details – continued

1.6 Contact details

Provide an email address as this will help make it easier for you to create an online account.

You need to let us know as soon as possible if any of your details change.

Home phone number

Mobile phone number

Email address

1.7 What language would you like us to use on the letters we send you?

If you don't select any option, we'll write to you in English. You can change your preference at any time by calling us.

English

Welsh

1.8 What is your home address?

You need to let us know as soon as possible if any of your details change.

Home address (give your full address details)

Postcode

Country

1.9 Will you live somewhere other than your home address while you study?

You can update your address(es) at any time by logging into your online account or by calling us.

No – go to **1.10**

Yes – give details

Term-time address

Postcode

Country

When did/will you move to your term-time address?

Day Month Year
 / /

Section 1 Your details – continued

1.10 Give your UK bank or building society information

This must be a UK bank or building society account in your own name and be able to accept direct credits.

If you don't have a UK bank or building society account you will need to get one before we can pay you. Let us know the account details as soon as you can.

Please note that incorrect bank or building society details will result in your loan payments being delayed.

Sort code

 - -

Account number

Building society roll number (if applicable)

1.11 Will you be applying for Disabled Students' Allowances (DSAs)?

You can apply for DSAs if you're a higher education student, living in Wales and have a disability including a long-term health condition, mental health condition or a specific learning difficulty.

For more information about DSAs go to www.studentfinancewales.co.uk/pgfinance

No – I won't be applying for DSAs

Yes – I've already applied for DSAs

Yes – I will be applying for DSAs

You can download the 'Application for Disabled Students' Allowances' from www.studentfinancewales.co.uk/pgfinance

Section 2 Your previous study

If you've previously received funding (not including DSAs) towards a Postgraduate Master's degree from Student Finance England, Student Finance Wales, Student Finance Northern Ireland or the Student Awards Agency Scotland, you're not eligible to get Postgraduate Master's Finance and shouldn't submit an application.

2.1 Do you already hold a postgraduate qualification?

No – go to **Section 3**

Yes

2.2 Tick the relevant box to show which qualification you received



Doctoral degree

Master's degree

Integrated Master's degree

Honorary Master's
(MAs from an Oxford, Cambridge, Trinity College Dublin or a Scottish University)

Postgraduate Certificate

Postgraduate Certificate in Education (PGCE)

Higher Doctoral

Level 8 award

Postgraduate Diploma

Other postgraduate qualification – Give details below

(including any postgraduate qualification achieved abroad)

Course title

Qualification name

Name of university or educational institution

Address

Postcode

Country

Section 3 Your Postgraduate Master's course

3.1 Will you be studying a full Master's course?

A full Master's course is a minimum of 180 credits.

You may not be completing a minimum of 180 credits if you're:

- using previous study, academic credits or experience to exempt you from part of the course work
- studying a top-up course (60/80 credits)
- studying a Postgraduate Certificate (60 credits)
- studying a Postgraduate Diploma (120 credits)

If any of these apply to you, you should answer 'No'.

If you're not sure if you are studying a full Master's course you must discuss this with your university before applying for Postgraduate Master's Finance.


3.2 Give details about the postgraduate Master's course you've applied for

If you've applied for more than one Master's course tell us about your preferred choice.

Give as much detail as you can at the time of your application.

If you are following a combined studies or modular course, please list all subjects being studied.

If any of these details change log into your online account or call us to update your information.

 Read the notes to find out more about the different types of courses. Ask your university if you're unsure what to pick.

No – you shouldn't continue with your application as you are not eligible for Postgraduate Master's Finance. You should contact your university or college to discuss other funding options that may be available.

Yes

University name

University address

Postcode

Country

Name of campus/location

Course name

Start date of the first year of your course

Month Year

 /

Course type

Taught Master's

Research-based Master's

Study type and duration

Full-time – 1 year

Full-time – 2 years

Part-time – 2 years

Part-time – 3 years

Part-time – 4 years

Section 3 Your Postgraduate Master's course

3.3 Are you eligible to apply for a Social Work bursary?



- No
- Yes – have you applied and been rejected for this?
- No – you shouldn't continue with your application. You need to apply for a bursary, read the notes for more information.
- Yes – I've applied and been rejected. You need to send your rejection letter with your application.

3.4 Will you be receiving an NHS bursary?



- No
- Yes – you shouldn't continue with your application. Read the notes for more information.

3.5 Is this a distance learning course?



- No
- Yes – are you studying a distance learning course because you or a member of your family are in the armed forces?
- No
- Yes – you need to send us evidence. Read the notes to find out what to send.

3.6 Will you be receiving a Knowledge Economy Skills Scholarship (KESS2)?



- No
- Yes – you shouldn't continue with your application as you're not eligible for Postgraduate Master's Finance.

Section 4 Your residency information

4.1 Are you a UK national?

No – go to 4.3

Yes

4.2 Do you hold a valid in date UK passport?



We will share the passport details you provide with HM Passport Office to confirm that they're valid.

No – you need to send supporting documents to prove your identity. Read the notes to find out what to send and include this with your completed application form.

Yes – complete the following exactly as stated on your passport.

Date of issue

Day Month Year
 / /

Date of expiry

Day Month Year
 / /

Passport number

Forename(s)

Surname

Go to Section 5

4.3 Are you an EU national?



No – go to 4.4

Yes – you need to send supporting documents to prove your identity. Read the notes to find out what to send and include this with your completed application form.

Go to Section 5

4.4 Are you the family member of an EU national?



No – go to 4.5

Yes – tell us their relationship to you (for example 'mother')

You need to send supporting documents to prove your family member's nationality and their relationship to you. Read the notes to find out what to send and include this with your completed application form.

Go to Section 5

Section 4 Your residency information – continued

4.5 Are you the child of a Swiss national?



- No – go to **4.6**
- Yes – will your Swiss national parent live in the UK on the first day of the first academic year of your course?
- No – go to **4.6**
- Yes – you need to send supporting documents to prove your parent’s nationality and their relationship to you. Read the notes to find out what to send and include this with your completed application form.

Go to Section 5

4.6 Are you a European Economic Area (EEA) national or Swiss national who:



- is working in the UK; or
- has worked in the UK and is looking for work in the UK?

- No – go to **4.7**
- Yes – will you continue to work during your Postgraduate Master’s studies?
- No – go to **4.7**
- Yes – you need to download and complete the UK Employment Status form and return it with your application for Postgraduate Master’s Finance.

The UK Employment Status form is available from
www.studentfinancewales.co.uk/pgfinance

Go to Section 5

4.7 Are any of the following:



- your husband/wife/civil partner
- your parent(s)/step-parent(s)
- your child/son/daughter-in-law/child’s civil partner

a European Economic Area (EEA) national or Swiss national who:

- is working in the UK; or
- has worked in the UK and is looking for work in the UK?

We need your EEA national family member’s details to work out if you can get student finance. You must tell them that you’ve given us their details.

- No – go to **4.8**
- Yes – will they continue to work during your Postgraduate Master’s studies?
- No – go to **4.8**
- Yes – you need to download and complete the UK Employment Status form and return it with your application for Postgraduate Master’s Finance.

The UK Employment Status form is available from
www.studentfinancewales.co.uk/pgfinance

Go to Section 5

Section 4 Your residency information – continued

4.8 Are you the child of a Turkish worker who is working in the UK?



- No – go to **4.9**
- Yes – you need to send supporting documents to prove your parent’s nationality, their relationship to you and their employment status. Read the notes to find out what to send and include this with your completed application form.

Go to Section 5

4.9 Do you have ‘settled status’ in the UK?



- No – go to **4.10**
- Yes – give the date you received this status

Day Month Year
 / /

You need to send supporting documents to prove your status. Read the notes to find out what to send and include this with your completed application form.

Go to Section 5

4.10 Have you or your:



- husband/wife/civil partner; or
 - parent(s)/step-parent
- been granted ‘refugee status’ by the UK Government?**

- No – go to **4.11**
- Yes – give your Home Office number

Give the date this status will expire

Day Month Year
 / /

You need to send supporting documents to prove your/their status and their relationship to you. Read the notes to find out what to send and include this with your completed application form.

Go to Section 6

Section 4 Your residency information – continued

4.11 Have you or your:



- husband/wife/civil partner
- parent(s)/step-parent

been granted:

- 'Leave to enter or remain' in the UK as a result of a failed asylum application;

or

- Discretionary Leave where no application for asylum has been made;

or

- 'Leave to enter or remain' in the UK on the grounds of family or private life;

or

- 'Leave to enter or remain' in the UK following a failed application for 'Leave to enter or remain' on the grounds of family or private life on the grounds of Article 8 of the ECHR;

or

- Humanitarian Protection?

4.12 Have you or your:



- husband/wife/civil partner; or
- parent(s)/step-parent

been granted 'Leave to remain' as a Stateless Person?

4.13 Have you been granted Leave to enter or remain in the UK under Section 67 of the Immigration Act 2016 or are you the child of someone who has?



No – go to **4.12**

Yes – give your Home Office number

Give the date this status will expire

Day Month Year

 / /

If you/they haven't been given an expiry date you should mark the expiry date box as 'N/A' (not applicable).

You need to send supporting documents to prove your/their status and their relationship to you. Read the notes to find out what to send and include this with your completed application form. **Go to Section 5**

No – go to **4.13**

Yes – give your Home Office number

Give the date this status will expire

Day Month Year

 / /

You need to send supporting documents to prove your/their status and their relationship to you. Read the notes to find out what to send and include this with your completed application form. **Go to Section 5**

No – if you have answered 'No' to all of the questions in this section, you're not eligible for Postgraduate Master's Finance from Student Finance Wales.

Yes – give your Home Office number

Give the date this status will expire

Day Month Year

 / /

You need to send supporting documents to prove your/their status and their relationship to you. Read the notes to find out what to send and include this with your completed application form. **Go to Section 5**

Section 5 Your address history

We need to know where you lived for **3 years** before the first day of your first academic year of your course. If you leave any gaps in your address history this will delay your application.

The first day of your academic year is:

- 1 September, where your course begins on or after 1 August and before 1 January;
- 1 January, where your course begins on or after 1 January and before 1 April;
- 1 April, where your course begins on or after 1 April and before 1 July;
- 1 July, where your course begins on or after 1 July and before 1 August.

For example if your course starts on 5 September this year, then the first day of your academic year is 1 September. We need to know your complete address history for 3 years before 1 September.

5.1 Give details of your residence for the three years before the first day of your academic year.

You don't need to send proof of your previous addresses at this time, but we might ask for it in the future.

If you need more space attach an additional piece of A4 paper to your completed form.

Remember to include your Customer Reference Number.

Address

Postcode

Country

From

Day Month Year
 / /

To

Day Month Year
 / /

Tick this box if you'll be living here when your course starts

Tell us why you moved here

Address

Postcode

Country

From

Day Month Year
 / /

To

Day Month Year
 / /

Tick this box if you'll be living here when your course starts

Tell us why you moved here

Section 6 How much would you like to borrow?

Complete this section to tell us how much Postgraduate Master's Finance you want to apply for. The maximum support available is **£17,489**. Your finance will be made up of loan and grant.

- You can apply for a maximum loan of **£16,489**.
- The minimum grant you'll receive is **£1,000** which is not based on household income.
- You can apply to have your funding based on your household income. Depending on your household income, the maximum grant you may be entitled to is up to **£6,885**.
- Your total funding can't exceed **£17,489**. If your funding is based on household income and you're awarded more than the £1000 minimum grant, we'll replace some of your loan with grant.

6.1 Would you like to apply for a higher amount of Postgraduate Master's Grant?

Yes - you may be entitled to a grant up to **£6,885**.

No - if you do not want your household income assessed you will still receive a grant of **£1,000**.

6.2 How much Postgraduate Master's Loan would you like apply for?

If you only want to apply for grant, leave this question blank.

The maximum amount of up to £16,489

A different amount of £ ,

Section 7 Your additional contacts

We know that people sometimes forget to let us know if they move home or change telephone numbers. Please provide us with two additional contacts so that we can keep in contact with you.

We'll only use their details to get back in contact with you, nothing else. By entering these details, you're confirming you've told them about this and they're happy for Student Loans Company to contact them if necessary.

Where possible provide UK based contacts.

7.1 Give the contact details for your first additional contact

This person **can** live at the same address as you.

Contact 1

Full name

Relationship to you

Address

Postcode/Zip code

Phone number

(including international dial code if outside UK)

7.2 Give the contact details for your second additional contact

This person **can't** live at the same address as you or your first contact.

Contact 2

Full name

Relationship to you

Address

Postcode/Zip code

Phone number

(including international dial code if outside UK)

What sections should I complete now?

Your next steps depend on whether or not you're applying to have your funding based on your household income.

I'm applying to have my funding based on household income:

- read, sign and date the terms and conditions on **page 18** and **19**
- complete **Sections 9** and **10**
- depending on your answers in **Section 9**, you may need to pass your form to your parent(s) or partner to complete **Sections 11 onwards** and sign the declaration(s) on **page 34**
- go to the checklist on **page 36**, make sure you've completed all relevant sections of the form and included any evidence we've asked for. You can find out what evidence you need to send in the 'Postgraduate Master's Finance Application for New Students Supporting Notes'

I'm not applying to have my funding based on household income:

- read, sign and date the terms and conditions on **pages 18** and **19**
- go to the checklist on **page 36**, make sure you've completed all relevant sections of the form and included any evidence we've asked for. You can find out what evidence you need to send in the 'Postgraduate Master's Finance Application for New Students Supporting Notes'

Section 8 Terms and conditions



You must sign, date and return this form before any payment can be made to you.

These terms and conditions (“terms”) and applicable legislation apply to all of the student finance available to students for the academic year 2020/21.

I understand that my application for student finance may be delayed unless I sign and date these terms.

Loan Contract

1. I confirm I have read and understood these terms and A Guide to Terms and Conditions available at www.studentfinancewales.co.uk/terms-and-conditions
2. 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 that I may not receive student finance, any support I have had may be withdrawn and I could be prosecuted.
3. I understand that student finance is provided to me by the Welsh Ministers (the “Lender”) which includes any persons acting on their behalf and any replacement(s) under section 23(4) of the Teaching and Higher Education Act 1998 as amended or replaced from time to time (the “Act”).
4. I understand these terms, the Act and the regulations made under section 22 of the Act will apply to any student finance provided to me by the Lender.
5. I understand that “student finance” in these terms means financial support by way of grant(s) and/or loan(s) made by the Lender under the regulations.
6. I understand that the Student Loans Company Limited (“SLC”) carries out certain functions on behalf of the Lender.

My Obligations

7. I understand that if I have:
 - (i) reached the age of 18 years; and
 - (ii) have entered into agreement(s) for a loan under section 22 of the Act before I reached the age of 18 years,I am agreeing to “ratify” any and all such student loans by signing these terms. This means that I confirm I entered into agreement(s) with the Lender and agree to the terms of any such previous agreement(s). If I have reached the age of 18 and refuse to “ratify” any previous agreement(s), I understand that I will not be eligible to get any further student finance under the regulations.
8. I agree to give SLC any information they need in support of this application for student finance and/or to seek repayment.
9. I agree to tell SLC immediately if my circumstances change in any way that might affect my entitlement to student finance. I understand that if I do not do this I may not get any further payments and I may have to repay the student finance I have already received. I agree that from the date I submit my student finance application until my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I must tell SLC about any changes in my personal details (including my National Insurance number) and contact details I have provided.

10. I agree that if I get an overpayment of student finance, I need to repay this in full and that any overpayment may be taken from any future entitlement to student finance.
11. I agree that I will repay the Lender any loan(s), together with all and any interest, penalties and charges which apply. I understand that this repayment will be due by me to the Lender as a debt. If I breach any of the terms of my loan, I agree to pay any charges and penalties which apply under the Act and the regulations. I understand that I will repay my loan(s) through the United Kingdom (“UK”) tax system and/or I may repay SLC directly. If I live abroad, I will repay my loan(s) to SLC directly.
12. I agree that any loan(s) made to me in accordance with the regulations once my application is accepted by the Lender is a/are contract(s) between me and the Lender. I understand that I am liable for my loan(s) and will be charged interest from the first payment of the loan advance by the Lender.
13. I agree to tell SLC if I leave the UK to live outside the UK or if for any other reason I am outside the UK tax system for more than three months.

Legal Action and Applicable Law

14. In the event of any legal action, I agree that the laws of England and Wales will apply and that the courts of that part of the UK will hear any legal action. If my address is outside the UK the laws of the part of the UK where my education provider is situated will apply and the courts of that part of the UK will hear any legal action. I agree that the Lender has the right to take legal action against me in any other court with jurisdiction.

Sharing Information

15. If I am in breach of these terms and/or the regulations I agree that the Lender may share information held about me and my account with third parties, including the government or a government agency of another country, who may help to locate me and/or help take action to recover any payments I owe.
16. I confirm where I have provided any personal information about any other person in my student finance application, I have done so with their consent.
17. I understand that SLC will process my personal data in line with the Privacy Notice available at www.studentfinancewales.co.uk/privacy-notice which may be updated from time to time.

Disabled Students’ Allowances (“DSAs”)

This section applies if I apply for DSAs this academic year.

18. I understand that any equipment I receive through DSAs must be used for my course of study and that I am responsible for paying any repair costs.
19. I understand that if I consent to SLC sourcing my equipment and support, SLC can pay the suppliers of any approved equipment and support directly.
20. I understand that with my consent, SLC can make payment to the needs assessment centre on my behalf.

Section 8 Terms and conditions – continued

21. I understand that with my consent, SLC can make a direct payment on my behalf to third parties providing any other approved service or support to me.
22. If I do not agree to SLC paying the suppliers of equipment, support or other services on my behalf, I understand that I will be responsible for meeting the costs of any approved equipment, support or other services out of my DSAs allowance. SLC reserves the right to request evidence of receipt of equipment, support or other services in relation to my DSAs.
- Alternative Funding**
23. I confirm that I have not previously received any loan(s) for a Postgraduate Master's degree under the regulations or where this was provided out of funds from another UK government authority. I understand the Lender may waive this requirement where I was unable to complete my course due to compelling personal reasons.
24. I confirm that I have not previously received a base grant or contribution to costs grant for a Postgraduate Master's degree under the regulations. I understand the Lender may waive this requirement where I was unable to complete my course due to compelling personal reasons.
25. I confirm that in connection with my course I have not been paid or had bestowed upon me:
- (i) a healthcare bursary;
 - (ii) any allowance under the Nursing and Midwifery Student Allowances (Scotland) Regulations 2007; and/or
 - (iii) any allowance, bursary or award made under the KESS 2 Scheme.
26. I confirm that in connection with my course I have not been paid or had bestowed upon me any allowance, bursary, or award of similar description made under section 116(2)(a) of the Regulation and Inspection of Social Care (Wales) Act 2016 or under section 67(4)(a) of the Care Standards Act 2000, except where such funding is in respect of travel expenses. I understand that if I only receive travel expenses, I may apply for a loan.
27. Subject to paragraphs 23 - 26 above, I understand that SLC will take such action as is necessary to recover repayment of a loan where I am in receipt of alternative funding.

Customer Reference Number (if you have one)

--	--	--	--	--	--	--	--	--	--	--	--

Your signature (in ink)

X

Today's date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>



Section 9 Dependent or independent student

9.1 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

9.2 Will you be aged 25 or over on the first day of the academic year?



No – go to **9.2**

Yes – you **don't** need to provide details of your household income. Make sure you've signed and dated the terms and conditions on **pages 18 and 19** then go to the checklist on **page 36**

No – go to **9.3**

Yes – what will your marital status be at the start of the academic year?

Married/civil partnership - your partner needs to provide their financial details


Please give the date of marriage/
civil partnership


Day Month Year


/ /

Go to 9.11

Living with a partner - your partner needs to provide their financial details – go to **9.11**

 Separated – go to **Section 10**

 Divorced/dissolved civil partnership – go to **Section 10**

 Widowed/surviving civil partner – go to **Section 10**


Single – go to **Section 10**

Section 9 Dependent or independent student – continued

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

No – go to **9.4**

Yes – what is your current marital status?


 Married/civil partnership - your partner needs to provide their financial details


Please give the date of marriage/civil partnership


Day Month Year

/ /

Go to **9.11**


 Separated from your spouse/civil partner – go to **Section 10**

 Divorced/dissolved civil partnership – go to **Section 10**

 Widowed/surviving civil partner – go to **Section 10**


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

No – go to **9.5**

Yes – you're an independent student.
 **Go to Section 10**


9.5 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 **9.6**

Yes – you're an independent student.
 **Go to Section 10**


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

No – go to **9.7**

Yes – you're an independent student.
 **Go to Section 10**


9.7 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.

No – go to **9.8**

Yes – you're an independent student.
 **Go to Section 10**


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

No – go to **9.9**

Yes – you're an independent student.
 **Go to Section 10**

Section 9 Dependent or independent student – continued

9.9 Are both your parents deceased?

- No – go to **9.10**
- Yes – you're an independent student.
 **Go to Section 10**

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

- Both parents – go to **9.11**
- One parent – What is their marital status?
- Living with a partner
 - Separated
 - Divorced/dissolved civil partnership
 - Widowed/surviving civil partner
 - Single
- Go to 9.11**

9.11 Please provide details of the parent(s)/partner who'll be providing their financial information.

Person 1

Their relationship to you

Tick one

- Natural or adoptive parent
- Step-parent
- Husband, wife, civil partner or cohabiting partner of one of your parents
- Husband, wife, civil partner or cohabiting partner

Title

- Mr Mrs Miss Ms Mx
- Doctor Professor

Forename(s)

Surname/family name

Person 2

Their relationship to you

Tick one

- Natural or adoptive parent
- Step-parent
- Husband, wife, civil partner or cohabiting partner of one of your parents

Title

- Mr Mrs Miss Ms Mx
- Doctor Professor

Forename(s)

Surname/family name

Section 10 Your income and dependants

10.1 Will you be receiving any taxable 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

10.2 Will your employer be releasing you to attend your course this academic year?

10.3 During this academic year, will you or your employer pay any money into a pension fund on your behalf?

10.4 Give details of any children who will be wholly or mainly financially dependent on you during this academic year

If you need to include more than one child, use the additional notes at the back of this form.

No – go to **10.2**

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?

No – go to **10.3**

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

£

No – go to **10.4**

Yes – how much?

£

Child's forename

Child's surname

Child's date of birth

Day Month Year

 / /

If you're a **dependent student**, pass this form to your parent(s) to complete **Section 11 onwards**.

If you're **married/in a civil partnership**, pass this form to your spouse/civil partner to complete **Section 11 onwards**.

If you're **over 25** and married/in a civil partnership or living with a partner, pass this form to your partner

If you're an **independent student**, go to the checklist on **page 36** to complete your form.

Financial details for tax year **2018-19** for parents and partners

Who needs to complete following sections?

You can find out who should complete the following sections by checking the information at the bottom of **Section 10**. Give your form to that person to complete the next section.

About these sections

As part of a student's application for student finance we ask them to confirm their current living arrangements. Depending on their age and who they live with, they may need to ask someone to send us some information in support of their application. This is so that they can get the student finance they're entitled to. If you would prefer to provide your details separately, go to **www.studentfinancewales.co.uk/pgfinance** where you can download and complete an 'Assessment of Financial Circumstances Form'.

What you need to tell us

Some personal details and your income for the tax year 2018-19. We can't accept income details from any other tax year. We'll use your income details to work out how much student finance the student(s) you are supporting will receive.

How to complete these sections

Follow the instructions, we'll tell you what questions you need to answer and what ones you can skip.

You'll need to have your UK National Insurance number (if you have one), and your P60 or tax return information for tax year 2018-19 to hand.

You need to complete all of the questions you're asked to. Any missing information will delay the student's application for student finance.



Where you see this icon it means there's additional information in the 'Postgraduate Master's Finance Application for New Students Supporting Notes'. This could be information about how to complete a question or section or an instruction to send specific supporting documents.

To find out how we'll use the information you provide go to **www.studentfinancewales.co.uk/privacynotice** to read our Privacy Notice before completing this form.

What happens if your household income has dropped since tax year **2018-19**?

If your household income has dropped by 15% or more since tax year 2018-19, you can apply for a 'Current Year Income assessment'.

To do this, you must complete this form and then go to: **www.studentfinancewales.co.uk/pgfinance** to download and complete a 'Current Year Income form'.

Please note that we can't use your Current Year Income form if you don't complete and return this form too.

Section 11 Personal details – parent(s) or partner

Person 1

Your Customer Reference Number

(if you have one)

What is your relationship to the student?

Tick one

- The student's natural or adoptive parent
- The student's step-parent
- The husband, wife, civil partner or cohabiting partner of one of the student's parents
- The husband, wife, civil partner or cohabiting partner of the student

Title

- Mr Mrs Miss Ms Mx
- Doctor Professor

Forename(s)

Surname/family name

Any previous names you have been known by

Date of birth

Day Month Year

 / /

Nationality

Place of birth

Sex

- Male Female

Preferred correspondence language

- English Welsh

Person 2

Your Customer Reference Number

(if you have one)

What is your relationship to the student?

Tick one

- The student's natural or adoptive parent
- The student's step-parent
- The husband, wife, civil partner or cohabiting partner of one of the student's parents

Title

- Mr Mrs Miss Ms Mx
- Doctor Professor

Forename(s)

Surname/family name

Any previous names you have been known by

Date of birth

Day Month Year

 / /

Nationality

Place of birth

Sex

- Male Female

Preferred correspondence language

- English Welsh




Section 11 Personal details – parent(s) or partner – continued

11.1

Person 1

What is your current marital status?

Tick one

- Married/civil partnership
- Living with a partner
- Separated 
- Divorced/dissolved civil partnership 
- Widowed/surviving civil partner 
- Single

Home address

Give your full address details

Postcode

Home telephone number




Mobile number

Email address

Person 2

What is your current marital status?

Tick one

- Married/civil partnership
- Living with a partner
- Separated 
- Divorced/dissolved civil partnership 
- Widowed/surviving civil partner 
- Single

Home address

Give your full address details

Postcode


Home telephone number

Mobile number


Email address

11.2

Will you be a student in the 2020/21 academic year?

- No
- Yes – will you be receiving a statutory award? 
- No
- Yes

Will you be a student in the 2020/21 academic year?

- No
- Yes – will you be receiving a statutory award? 
- No
- Yes

Section 11 Personal details – parent(s) or partner – continued

We will share and check the details you give us with HM Revenue and Customs, allowing us to gain the most accurate financial information possible. This can only be done if you have a valid National Insurance (NI) number. This information will be kept securely and held strictly under the provisions of the applicable data protection legislation in the UK.

If you don't have a NI number we'll ask you to provide photocopies of your financial documents. If you provide your NI number we'll use this information and share and check it with HM Revenue and Customs in order to obtain accurate financial information about you.

11.3 Person 1

Do you have a UK National Insurance number?

Tick one

No – is this because you only receive non-UK taxable income?

No – go to **Section 12**

Yes – go to **Section 12 Part D**

You will need to send us evidence of your income.

Yes – give your UK National Insurance number

- -

Go to Section 12

Person 2

Do you have a UK National Insurance number?

Tick one

No – is this because you only receive non-UK taxable income?

No – go to **Section 12**

Yes – go to **Section 12 Part D**

You will need to send us evidence of your income.

Yes – give your UK National Insurance number


- -

Go to Section 12

Section 12 Financial questions

Part A Your financial information for the tax year 2018-19

How to complete Part A

- Any amounts or information you give must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- You must give **gross** income amounts.
- For any income paid in a foreign currency you must state the equivalent in pounds sterling.
- You can use your P60 or online tax return information to complete this section. If you completed a paper tax return you can download a guide from: www.studentfinancewales.co.uk to help you complete this section.
- Where you see the  icon, you can find more information about that question in the accompanying notes.

If you're self-assessed


If you completed an online tax return

You should refer to your saved online tax return for the income figures required in this section.

If you completed a paper tax return

There's an online guide to help you answer the questions in this section go to: www.studentfinancewales.co.uk to download it.

Remember to answer every question – if you leave a question blank we won't be able to accept this form.

Q1  Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

a Total income from salary / wages

b Total income from taxable state benefits

c Total income from occupational pension(s)

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

d Total income from private pension(s)

Don't include payments from War Pensions

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

Person 1

Yes No

£

£

£

£

Person 2

Yes No

£

£

£

£

Q2 Did you receive any income from a state retirement pension?

a Total non-lump sum amount received

b Total lump sum amount received

Person 1

Yes No

£

£

Person 2

Yes No

£

£

Section 12 Financial questions – continued

Q3 Did you receive any income from savings and investments?



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

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

c Total income from UK investments and dividends

d Total income from foreign investment and dividends

Person 1

Yes No



£

£

£

£



£

£

£

£

Q4 Did you receive any taxable benefits in kind?



(for example a company car or private medical insurance)

Total income received from taxable benefits in kind

Person 1

Yes No



£



£

Q5 Did you receive any other income during the 2018-19 tax year that you haven't yet told us about?

Person 1 Yes → go to **Part B**

No → go to **Part C**

Person 2 Yes → go to **Part B**

No → go to **Part C**


Section 12 Financial questions – continued

Part B Other income

How to complete Part B

- Any amounts or information you give must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- You must give **gross** income amounts.

Remember to answer every question – if you leave a question blank we won't be able to accept this form.

	Person 1	Person 2
Q1 Did you receive any income from self-employment?  a Total adjusted profit from businesses	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £
b Total adjusted profit from partnerships	£	£
Q2 Did you receive any income as a Minister of religion?  Total taxable income minus expenses that are not included on your P60 or P11D	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £
Q3 Did you receive any other taxable income or lump sums?  Total income received	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £
Q4 Did you receive any income from property lettings?  Total income received	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £
Q5 Did you receive any income from UK trusts?  Total income received	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £
Q6 Did you receive any foreign income?  Total income received	<input type="checkbox"/> Yes <input type="checkbox"/> No £	<input type="checkbox"/> Yes <input type="checkbox"/> No £

Section 12 Financial questions – continued

Q7 Did you receive any income from an overseas pension?



Total income received

Person 1

Yes No

£

Person 2

Yes No

£

Q8 Did you receive any other overseas income and gains?



Total income received

Yes No

£

Yes No

£

Part C Income deductions

How to complete Part C

- Any amounts or information you give must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- You must give **gross** income deduction amounts.
- If you don't receive a specific deduction type listed in a question – write 'n/a'.

Remember to answer every question – if you leave a question blank we won't be able to accept this form.

Q1 Did you pay any private pension contributions?

Total amount you paid

Person 1

Yes No

£

Person 2

Yes No

£

Q2 Did you pay any Additional Voluntary Contributions (AVCs)?

Total amount you paid

Person 1

Yes No

£

Person 2

Yes No

£

Q3 Did you have any allowable expenses on which you claimed tax relief?



Total amount on which you claimed tax relief

Person 1

Yes No

£

Person 2

Yes No

£

Section 12 Financial questions – continued

Part D Your dependants

About this section

We need to know about any other dependent children.

By dependent child we mean any of your children that are financially dependent on you (and your cohabiting partner). If they're 18 or over, we'll need evidence to confirm they're financially dependent on you.

Q1 Are there any children who are financially dependent on you?

Do not include the applicant when completing this question.

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

If you're supporting any other student's application for student finance that you haven't included in this section, you should provide their details in the additional notes of this form. This means any student(s) your supporting will receive the correct student finance.

No – go to **Section 13**

Yes – give details below

Child 1

Full name

Date of birth

Day Month Year

 / /

Is this child in further or higher education?

No

Yes - will you be supporting their application for student finance (if they have one)?

No - if this changes you should contact us to let us know. This means any student(s) you're supporting will receive the correct student finance.

Yes

Child 2

Full name

Date of birth

Day Month Year

 / /

Is this child in further or higher education?

No

Yes - will you be supporting their application for student finance (if they have one)?

No - if this changes you should contact us to let us know. This means any student(s) you're supporting will receive the correct student finance.

Yes

Section 13 Non-UK taxable income

About this section

Complete this section if you only received non-UK taxable income in the tax year 2018-19.

You need to tell us:

- the source of each income type;
- The country you received this income;
- your figures in their original currency, **don't** convert your income to GBP;
- the gross income amounts. This is the amount before tax has been deducted; and
- the period in tax year 2018-19 you received your income. If you received income from a country where the tax year is different to the UK, use the tax year of that country. For example, if you received income from Spain where the 2018-19 tax year in ran from 1 January 2018 to 31 December 2018, we need to know about any income you received between those dates.

Person 1

Source of income (for example; Salary/ wages, pension, taxable benefits)	Country	Currency	Gross income (amount before tax deducted)	Period in tax year 2018-19	
				from Day Month Year	to Day Month Year

Person 2

Source of income (for example; Salary/ wages, pension, taxable benefits)	Country	Currency	Gross income (amount before tax deducted)	Period in tax year 2018-19	
				from Day Month Year	to Day Month Year

Section 14 Declarations

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

Person 1

Read, then sign and date where indicated

- 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 that the students I am supporting may have their financial support 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 my circumstances that might in any way affect this application for financial support.

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"/>
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Your full name (BLOCK CAPITALS)

Your signature (in ink)

Person 2

Read, then sign and date where indicated

- 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 that the students I am supporting may have their financial support 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 my circumstances that might in any way affect this application for financial support.

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"/>
----------------------	----------------------	---	----------------------	----------------------	---	----------------------	----------------------	----------------------	----------------------

Your full name (BLOCK CAPITALS)

Your signature (in ink)

Additional notes

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

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 evidence of any income not paid through HMRC
For example, foreign income.
- Signed and dated the terms and conditions
- Paid the correct postage

Now return your form to us at: Student Finance Wales
PO Box 211
Llandudno Junction
LL30 9FU