

2020/21

PTMN

Application form for new part-time students

We welcome applications in Welsh. This won't lead to a delay in our response. You can also apply online at: www.studentfinancewales.co.uk

About this form

Who should complete this form?

Complete this form if you're living in Wales and:

- you're a part-time or Open University student applying for student finance for the first time
- your course start date is on or after 1 August 2018.

What sections should you complete?

All students need to complete sections **1 to 4** and read, sign and date the terms and conditions.

You'll also need to complete other sections of the form depending on what you want to apply for.

Students applying for Tuition Fee Loan only	Complete section 5 & 10
Students applying for Tuition Fee Loan and a Welsh Government Learning Grant and/or Maintenance Loan	Complete sections 5 to 11

Course Credits

Before applying, you need to know how many course credits you intend to study. Each module you study is worth a number of credits. You should agree how many credits you'll study with your university.

To apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or a Maintenance Loan, you need to have a course intensity of at least **25%** in the academic year.

Additional student finance

You may also be able to apply for additional financial support if:

- you have children or adults who depend on you financially
- you have a disability, long-term health condition, mental health condition or specific learning difficulty.

If you're studying on a distance learning course, you won't be eligible for additional financial support for dependents.

If you want to apply for additional student finance you need to tell us on page 2.

You can find out more about student finance and download our part-time guides at:

www.studentfinancewales.co.uk



Disabled Students' Allowances (DSAs)

If you want to apply for DSAs you'll need to

- complete and return this form **and**
- complete a Disabled Students' Allowances Application Form (DSA1).
You can download the DSA1 form at: www.studentfinancewales.co.uk

Tick the box below if you want us to send you a DSA form instead.

Send me a DSA form

Parents' Learning Allowance (PLA) and Adult Dependants' Grant (ADG)

If you want to apply for PLA or ADG you'll need to:

- complete and return this form **and**
- complete a Grants for Dependants application form for part-time students (PTGFD).
You can download the PTGFD form at: www.studentfinancewales.co.uk

Tick the box below if you want us to send you a PTGFD form instead.

Send me a PTGFD form

Childcare Grant (CCG)

If you want to apply for CCG you'll need to:



- complete and return this form **and**
- complete a Grants for Dependants application form for part-time students (PTGFD) **and** an Application for help with childcare costs for part-time students form (PTCCG1). You can download the PTGFD and PTCCG1 form at: www.studentfinancewales.co.uk

Tick the box below if you want us to send you a PTGFD and PTCCG1 form instead.

Send me a PTGFD and PTCCG1 form


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.

You may be eligible for a bursary or scholarship. In order for a university or college to determine and pay any bursary or scholarship to which you may be entitled, we will share some of your personal, financial and course details as well as information about your eligibility for student finance with them.


-  Where you see this icon it means there's information in the application notes to help you.
-  Where you see this icon it means we need you to send documents as supporting evidence. You can find details in the accompanying notes.

If any information we ask for is missing or unclear we may not be able to process your application and you won't receive any funding.

1 Your personal details

1.1 Customer Reference Number 
(if you have one)

<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"/>	<input type="text"/>
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1.2 Personal details
Complete these details exactly as stated on your birth certificate or passport.
If your name has changed from your birth certificate or passport then send us supporting evidence confirming the change. 

Title
 Mr Mrs Miss Ms

First name(s)

Surname


Any other names you may be known by

Sex
 Male Female

Date of birth
Day: - Month: - Year:

Place of birth (the name of the town or village)

Nationality

1.3 National Insurance number 
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.

<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"/>
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1 Your personal details – continued


1.4 Do you hold a valid UK passport?

You must prove your identity. The easiest way to do this is by giving information from your passport.

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

UK passport expired?

If your UK passport has expired we can't accept this information as proof of your identity. You'll have to give other evidence as explained in the accompanying notes.

No – you'll have to send alternative evidence 

Yes – complete the following details exactly as stated in your passport

Date of issue

Day Month Year
 - -

Date of expiry

Day Month Year
 - -

Passport number

First name(s)

Surname

1.5 Address details

Give your current home address.

Give your term-time address if you know it. If you give a term-time address we'll send correspondence to that address. You can update your address(es) at any time by contacting us.

Home address

Postcode

Term-time address

Postcode

Date you'll move to your term-time address

Day Month Year
 - -

1 Your personal details – continued

1.5.1 Contact details

Give your current contact details.

Home phone number

Mobile phone number

Email address

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


Welsh

English

1.7 Marital status

Tick one box that best describes your current marital status.


Single


Living with a partner 

Married/civil partnership

Give the date of marriage/civil partnership

Day Month Year
 - -

Separated 

Divorced/dissolved civil partnership 

Widowed/surviving civil partner 

2 Previous support and qualification history

2.1 Will you be getting funding from any other source to meet the costs of your tuition fees in this academic year?

Tell us about any contribution to your tuition fees that may be made by an employer, a bursary scheme, or from any other type of fund or sponsorship. Please note that we do not need to know if you are receiving a Care Leavers Higher Education Bursary.

No

Yes

What is the source of this funding?

How much funding will you receive?

2.2 Do you have a degree from an educational institution in the UK?

No

Yes - is this an honours degree?

No

Yes

2.3 Have you ever had any other loans from the Student Loans Company (SLC)?

No

Yes – are you behind with the repayments?

No

Yes – you can't apply for student finance until you resolve this. Call **0300 100 0611** for Income Contingent Repayment (ICR) loans. If you have any Mortgage Style (MS) loans please call your debt owner on the telephone number shown on the most recent correspondence that you have received from them. If you do not know who your debt owner is call **0300 100 0632** for advice.

2.4 Have you received funding from SLC for any previous part-time courses you've studied?

No – go to section 3

Yes

2 Previous support and qualification history – continued

2.4.1 Complete the table with details of any part-time Higher Education courses you've previously received funding for.

Course title and qualification (for example, BA (Hons) English)	Name and address of university or college (including town and country)	Start Date MM YYYY	End Date MM YYYY	Qualification gained?
				<input type="checkbox"/> No <input type="checkbox"/> Yes
				<input type="checkbox"/> No <input type="checkbox"/> Yes
				<input type="checkbox"/> No <input type="checkbox"/> Yes

3 Residence

3.1 Are you a UK national? ⓘ

 No

Yes – did you give your valid UK passport details in 1.4?

No – send evidence – go to 3.11 ⓘ

Yes – you don't need to send any other nationality evidence – go to 3.11

3.2 Are you an EU national?

 No

Yes – send evidence - go to 3.12 ⓘ

3.3 Are you the child of a Turkish Worker who is working in the UK? ⓘ

 No

Yes - send evidence - go to 3.12 ⓘ

3.4 Are you the child of a Swiss national? ⓘ

 No

Yes – will your Swiss national parent be living in the UK on the first day of your academic year?

No

Yes – send evidence – go to 3.12 ⓘ

3.5 Are you or your:

- husband, wife, civil partner or
- parent(s), step-parent or
- child, son- or daughter-in-law, child's civil partner

a European Economic Area (EEA) national or Swiss national who is working, has worked or is looking for work in the UK? ⓘ

No – go to 3.6

Yes – give details of employment send evidence ⓘ

Give details of your previous studies

3.5.1 If you're currently working, are you going to continue working during your studies?

No – go to 3.12


Yes – give details – send evidence ⓘ

go to 3.12

3 Residence – continued


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

No

Yes – when did you get this status? 


Day Month Year

- -


send evidence – go to 3.12 

3.7 Have you or your:

- husband, wife, civil partner or
- parent(s), step-parent


been granted ‘refugee status’ by the UK Government? 

No

Yes – when does this status expire? 

Day Month Year


- -

send evidence – go to 3.12 


3.8 Have you or your:

- husband, wife, civil partner or
- parent(s), step-parent

been granted:


- ‘leave to enter or remain’ in the UK as a result of a failed asylum application or
- ‘leave to enter or remain’ in the UK on the grounds of family or private life; or
- discretionary leave where no application for asylum has been made or
- Humanitarian Protection? 

No

Yes – when does this status expire? 


Day Month Year

- -


send evidence – go to 3.12 

3.9 Have you or your:

- husband, wife, civil partner or
- parent(s), step-parent


been granted ‘leave to remain’ as a Stateless Person? 


No

Yes – when does this status expire? 


Day Month Year

- -

send evidence – go to 3.12 


3.10 Have you been granted ‘leave to enter or remain’ in the UK under section 67 of the Immigration Act 2016, or are you the dependent child of someone who has? 

No

Yes – when does this status expire? 

Day Month Year

- -

send evidence – go to 3.12 

3 Residence – continued



If you're not a UK national and you've not been asked to send any evidence in this section you might not be eligible for student finance from Student Finance Wales. Before you continue with this form visit www.studentfinancewales.co.uk for more information.

3.11 In the three years prior to the start of the first academic year of your course, did you live outside the UK and Islands at any time?

- No
 Yes

3.12 Give details of your residence for the three years before the start of the first academic year of your course

Make sure you give full details for the three years prior to the start of the first academic year of your course. If you leave any gaps your application may be delayed until we get the information we need.

Full address

From

Day Month Year

To

Day Month Year

Why were you there?

Full address

From

Day Month Year

To

Day Month Year

Why were you there?

3.13 Did you move to Wales wholly or mainly for the purposes of receiving education?

- No
 Yes – you need to call us on **0300 200 4050**

3 Residence – continued

- 3.14 At any time since 1 September 2017 has:
- either of your parents, step-parents, guardians or
 - your husband, wife, civil partner
- lived or worked outside the UK and Islands or, in the case of an EU, EEA or Swiss national, outside the EEA or Switzerland?**

Make sure you give full details. If you leave any gaps your application may be delayed until we get the information we need.

No

Yes – give details

Full address

From

Day Month Year

To

Day Month Year

Why were they there?

Full address

From

Day Month Year

To

Day Month Year

Why were they there?

4 About your university or college and course

4.1 University or college details

If your course is at a university that is made up of a number of colleges, give the name of the college first, followed by the name of the university.

Name

Full address

4.1.1 If the course is franchised to another university or college, give the name and address of the other university or college

Name

Full address

4.1.2 Give the full name of your course

You should check the name of your course with your university or college. If the course details you give us can't be confirmed yet, your student funding may be delayed. Don't enter your module name here.

4.2 Qualification you expect to gain

For example, BA (Hons) English

4.3 In this academic year, when will you start your studies?

Month Year

4.4 When will you finish the final year of your course?

Month Year

4 About your university or college and course

4.5 Are you entering your first year of your current course?

- No
 Yes – go to 4.8

4.6 What year of your studies are you going into?

Make sure you tell us what year of your studies you're going into **not** the year of your course.

4.7 What date did you start your studies?

Month Year

4.8 How many credits do you plan to study this academic year? ⓘ

4.9 Full tuition fee amount your university or college is charging you this academic year ⓘ

£

4.10 Is your course a part-time postgraduate Initial Teacher Education (ITE) course? ⓘ

- No
 Yes

4.11 Have you been accepted on the Erasmus exchange program?

- No
 Yes ⓘ

4.12 Are you studying a part-time distance learning course?

- No - go to section 5
 Yes

4.13 Do you have a disability which prevents you from attending your university or college in person? ⓘ

- No
 Yes

4.14 Are you studying a distance learning course because you or a family member (who you live with) is currently serving in the Armed Forces outside Wales? ⓘ

- No
 Yes - send evidence ⓘ

! Before you continue...

What you need to know

Your course intensity must be at least 25% in academic year 2020/21 to be eligible to apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or Maintenance Loan.

What you need to do

The information below tells you which sections of the form you need to complete.

If you want to apply for a Tuition Fee Loan only

Complete section 5 & 10.

If you want to apply for a Tuition Fee Loan and a Welsh Government Learning Grant and/or Maintenance Loan

Complete section 5 to 11.

5 Your loan request

5.1 Tell us the amount of Tuition Fee Loan you want to borrow

Any Tuition Fee Loan you borrow will be paid directly to your university or college.

If you want the maximum available to you tick the box

If you want less than the maximum available to you tell us how much you want to borrow

£ (enter amount)

5.2 Tell us the amount of Maintenance Loan you want to borrow

We'll work out how much Welsh Government Learning Grant you can get first then the rest of your student finance will be awarded as a Maintenance Loan. If you request more Maintenance Loan than you're entitled to, we'll award you the lower amount.

If you want the maximum available to you tick the box

If you want less than the maximum available to you tell us how much you want to borrow

£ (enter amount)

5.3 Contact details

You must give the name and address of at least one contact. If you provide details of two contacts, the people you name should live at different addresses and will only be contacted if, for example, you move address and don't inform us. You must inform these people that you've named them as contacts.

Contact 1

First name(s)

Surname

Relationship to you

Address

Postcode

Home phone number

Contact 2

First name(s)

Surname

Relationship to you

Address

Postcode

Home phone number

6 Dependent and independent students



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.

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

Yes No

6.2 Have you been married or in a civil partnership at any time before the first day of the academic year?


Yes No


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

Yes No

6.4 Please tick the relevant box if any of the following apply to you

Your parents cannot be found or it is not reasonably practicable to get in touch with them.

You are irreconcilably estranged (have no contact with) from your parents and this will not change. 

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, you have been under a special guardianship order or you have been in the custody or legal care of, or have been given accommodation by a Local Authority for 13 weeks or more. 

Both your parents are deceased.

You have applied for student finance before, and the parent who provided their income details is deceased.


Your parents are living outside the European Union and the assessment of their financial circumstances would place them in jeopardy.

Your parents are living outside the European Union and it would not be reasonably practicable or possible for them to send you money.

If you have ticked any of the boxes above, you will be contacted for evidence and, subject to this, you may be considered independent.

If you have ticked any of the boxes above, **go to section 7**


6 Dependent and independent students – continued

6.5 Have you supported yourself financially for a total of three years or more before the start of the first academic year of your course? 

Yes No

If 'No' you are a dependent student **go to section 7**

If 'Yes', you may be considered an independent student. Please give details below.

Name and address of your employer or your benefit office	Did you work full or part-time	From	To	Amount of salary wages or benefit you have received (state whether it was weekly, monthly or yearly) 
		(MM YYYY)	(MM YYYY)	

7 Student financial details


The academic year is determined by when you begin your study. Please see page 9 of the guidance notes for academic year dates.

**If you leave any question blank we will not be able to process your application.
If a question does not apply to you, please enter 'None' or 'N/A' as the answer.**

Unearned income

7.1 Taxable **unearned** income is any income you receive from the following sources:

- Bank or building society gross interest
- Property, lettings or rent
- Dividends or investments
- Trusts or sponsorships
- Any other payment received for attending the course

Please 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 an employer

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

Yes No

If 'No' go to 7.3

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

£

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

Yes No




If 'Yes', how much during this period?

£

Dependent children

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

Your child's income includes their income from all sources after Income Tax and National Insurance contributions for tax year 2018-19.

Child's full name	Date of birth  (DD MM YYYY)	Relationship to you	Who will they live with?	Child's income   (£)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ Your UK bank or building society account details

8.1 Account details


Sort code
 - -


Account number

Building society roll number (if applicable)

 **We'll only use the bank details you provide to pay your Welsh Government Learning Grant and/or Maintenance Loan. Tuition fees will be paid directly to your university or college.**

9 About your family

If you are a **dependent student** go to question **9.1**. 

If you are an **independent student with a partner**, please read and sign the **terms and conditions**  on **pages 21 and 22** and then pass this form to your partner to complete **section 11**.

If you are a **single independent student**, go to the **terms and conditions** on **pages 21 and 22**.



9.1 Which parent do you normally live with, or have more contact with?

Mother Father

or

Both parents N/A

9.2 What is the current relationship status of this parent?

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

What you need to do next

Read and sign the **terms and conditions** on **pages 21 and 22** and then pass this form to your parent(s).

What your parent(s) need to do next

The parent(s) you normally live with should complete **section 11**.

If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also complete **section 11**.

Terms and Conditions

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 I must read the specific terms about the student finance products available because they will affect me if I apply for them at any time in this academic year.

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.
 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.

25. I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from:
 - (i) the childcare element of Working Tax Credit;
 - (ii) the childcare element of Universal Credit;
 - (iii) Tax-Free Childcare; and/or
 - (iv) the NHS Bursary Childcare Allowance;
 and I agree to tell SLC immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that SLC may share my personal data with HMRC to check whether I get childcare support.

Childcare Grant (“CCG”)

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

23. I understand that if I do not provide the evidence of childcare costs within the timescales set, I may lose my entitlement. If my childcare costs are different from the estimates I have provided, further payments of my CCG may increase or decrease accordingly. If no further CCG payments are due to be paid to me, I may be liable to repay any difference.
24. I understand that if I do not take up my childcare, or if I change to a childcare provider who is not registered or approved, I will have to pay back any overpayment.

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

Day

Month

Year

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

Who needs to complete this section?

Section 9 of this form tells you who needs to complete this section.

What details do I need to provide in this section?

You need to tell us some personal details and what your financial income was for tax year 2018-19. You must tell us your 2018-19 income details as we cannot accept amounts from any other tax year. We need your income amounts so we can work out what the student(s) you are supporting is entitled to.

Before completing this form, you should read the Privacy Notice on page 22 of the accompanying notes.

The student may be eligible for a bursary or scholarship. In order for a university or college to determine and pay any bursary or scholarship to which the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them. For more information about this, read our Privacy Notice.

About this section

Section 11 is split into six parts:

Part A - Tell us your name and address and some other personal information.

Part B - Tell us your National Insurance number.

Parts C and D - Answer every question.

Part E - Answer every question and tell us about any income deductions for tax year 2018-19 where appropriate.

Part F - Tell us about any children who are financially dependent on you.

How to complete this section

If you are a single parent of the student

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

If there are two parents in the student's household

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

If you are an independent student with a partner

Your partner needs to enter their information as Person 1, leave Person 2 blank.

If you're self assessed – read page 15 of the notes for more information. 

If you're not self assessed – you can use your P60 to complete this section.

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

If your household income will be **at least** 15% less than it was in tax year 2018-19 you can apply for a Current Year Income Assessment.

This means we would use your expected income for tax year 2020-21 instead of your actual income from tax year 2018-19 when calculating the student's entitlement. However, there must be at least a 15% drop in the **overall household income** (not just your own income) between these two tax years for us to do this and we will ask for evidence of your 2020-21 income at the end of that tax year.

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

Part A – Your personal details

Person 1

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

First name(s)

Surname

Any other names you may be known by

Date of birth

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

Place of birth
(name of town or village exactly as it appears
on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

Preferred correspondence language

 Welsh English

Person 2

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

First name(s)

Surname

Any other names you may be known by

Date of birth

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

Place of birth
(name of town or village exactly as it appears
on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

Preferred correspondence language

 Welsh English

You do not have to disclose your financial information to the student.


If you would like to provide your financial information separately, you can download a form at www.studentfinancewales.co.uk or alternatively, you can have the form sent to you by ticking the box below:

Person 1
Send me a separate form Tick

Person 2
Send me a separate form Tick

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

Part B – Data sharing and you

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. 

Person 1

I have an NI number Tick

Please provide your NI number below:

- -

You are now ready to provide your financial information.

[go to Part C](#)

I do not have an NI number Tick

If you do not have an NI number because you receive non-UK taxable income, please provide the equivalent financial information in pounds sterling.

You are now ready to provide your financial information.

[go to Part C](#)

Person 2

I have an NI number Tick

Please provide your NI number below:

- -

You are now ready to provide your financial information.

[go to Part C](#)

I do not have an NI number Tick

If you do not have an NI number because you receive non-UK taxable income, please provide the equivalent financial information in pounds sterling.

You are now ready to provide your financial information.

[go to Part C](#)

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


Part C - Your financial information for tax year 2018-19

Instructions

- Please give gross financial details for tax year from **6 April 2018 to 5 April 2019**.
- Answer 'Yes' or 'No' to every question. If you answer 'Yes' please provide the income amount.
- If any questions are left blank we will not be able to process this application.



You do not need to send us any evidence. However, you should keep all of your 2018-19 financial evidence as we may ask for it at a later date to verify the details you have provided.

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)

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 lump sum amount received

b Total non-lump sum amount received

Person 1

Yes No
▼

£

£


Person 2

Yes No
▼

£

£

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

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

£

£

£

£

Person 2
 Yes No

£

£

£

£

Q4 Did you receive any taxable benefits in kind? 

Total income received from taxable benefits in kind

Person 1
 Yes No

£

Person 2
 Yes No

£

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

Person 1 Yes → **go to Part D**
 No → **go to Part E**

Person 2 Yes → **go to Part D**
 No → **go to Part E**

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


Part D - Other income

Instructions

- Complete Part D in the same way you completed Part C giving gross financial details for the tax year from **6 April 2018 to 5 April 2019**.

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

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

Q6 Did you receive any foreign income? 

Person 1

Yes No


£

Person 2

Yes No

£

Total foreign income received

Q7 Did you receive any income from an overseas pension? 


Yes No

£

Yes No

£

Total income received

Q8 Did you receive any other overseas income and gains? 

Yes No

£

Yes No

£

Total income received

Part E – Income deductions

Instructions

- Complete Part E in the same way you completed Part C giving gross financial details for the tax year from **6 April 2018 to 5 April 2019**.

Q1 Did you pay any private pension contributions?

Person 1

Yes No

£

Person 2

Yes No

£

Total amount of private pension contributions you paid

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

Person 1

Yes No

£

Person 2

Yes No

£

Total amount of AVCs you paid

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

Person 1

Yes No

£

Person 2

Yes No

£

Total amount on which you claimed tax relief

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

Part F – Your dependants

Identify any children who will be wholly or mainly financially dependent on you. If you need to tell us about more children, use the Additional notes section at the back of this form.

Q1 Child dependants not in further or higher education in academic year 2020/21

Full name

Full name

Date of birth

Day Month Year

Date of birth

Day Month Year

Q2 Child dependants in further or higher education in academic year 2020/21

Do **not** include the applicant when completing this question.

If the student is your partner, please include any children they named in section 8 of this form if the children have applied for student finance.

Full name

Full name

Date of birth

Day Month Year

Date of birth

Day Month Year

School, college or university

School, college or university

Course

Course

Are they receiving financial support? If so, from which authority or organisation?

Are they receiving financial support? If so, from which authority or organisation?

Do you want to support this student's application for student finance?

Yes No

Do you want to support this student's application for student finance?

Yes No

Declaration for parents and partners

Before signing, you should read the Privacy Notice in the notes that accompany this form. 

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(s) I am supporting may have their support withdrawn and I could be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that Student Loans Company Ltd may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.

Person 1

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"/>

Person 2

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"/>

Returning the form

To make sure the student receives their first payment at the start of term, this form should be returned with all of the evidence we need as soon as possible. If the application form is returned more than 9 months after the start of the academic year it won't be processed, and the student may lose their full entitlement to student finance for this academic year.



Now pass this form back to the student.

12 Voluntary questions

The following questions are voluntary – you do not have to answer them. Whether or not you answer will not affect our assessment of your entitlement to financial support.

The information will be used to help the Welsh Ministers develop their policies in the future.

Q1 Do any of your parents have any higher education qualifications, for example, degrees and diplomas or certificates of higher education?

This includes your natural parents, your adoptive parents, your step-parents, partners of your parents, and your guardians.

- No
- Yes
- Don't know

Q2 How would you describe your ethnic origin?

White

- British
- Irish
- Any other white background

Black or Black British

- African
- Caribbean
- Any other black background

Mixed

- White and black Caribbean
- White and black African
- White and Asian
- Any other mixed background

Chinese or other ethnic group

- Chinese
- Any other

Asian or Asian British

- Indian
- Pakistani
- Bangladeshi
- Any other Asian background

Before you send your form make sure you've:



Completed your passport details on **page 3**

If you don't have a valid passport, you need to send us alternative evidence. If we can't confirm your identity we can't give you a loan and/or grant.

Tick



Included all documents we've asked for to support your application

If we don't receive all the information we need your application will be delayed.

Tick



Read, signed and dated the terms and conditions on **page 21**

If you don't sign the terms and conditions we can't give you a loan and/or grant.

Tick

Return your completed form to:
Student Finance Wales
PO Box 211
Llandudno Junction
LL30 9FU

Make sure that your completed application and all evidence are weighed and the postage costs are fully paid.

Remember to ask for proof of postage!

Additional notes

Additional notes