

cyllid myfyrwyr **cymru**
student finance **wales**



Welsh Government Learning Grant Further Education 2020/21



Financial Details Form



www.studentfinancewales.co.uk/wglgfe

How to complete the Financial Details Form

- Follow the instructions, we'll tell you what questions you need to answer and what ones you can skip.
- **Section 1** asks about you and who you live with, it will also tell you who needs to complete the rest of the form.
- **Sections 2, 3 and 4** will ask about your household financial details. Depending on your situation, either:
 - you (and your partner, if you have one); **or**
 - you and your parent(s); **or**
 - you, your parent and their partner (if they have one)will need to complete up to two of these sections. You will all need to have your National Insurance numbers to hand.
- **Section 5** contains your declarations which must be signed.
- You need to complete all of the questions you're asked to. Any missing information will delay your application.
- Where we ask for supporting documents – we will need it before your application can be fully processed. Any missing documents will delay your application.

Use the notes



Where you see this you should check the notes for specific **information** to help you complete a question or section.



Where you see this you need to send us **supporting documents**. Use the notes to find out exactly what you need to send. You should send **photocopies** of your evidence unless otherwise stated. We will return any original documents.

How we process your data

To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 11 of the accompanying notes.

Additional Help and Information

If you need any help to complete this form, please call us on **0300 200 4050 (Minicom: 0300 100 1693)**. Our website also has lots of helpful information about Welsh Government Learning Grant Further Education: **www.studentfinancewales.co.uk/wglgfe**

You can get forms and guides in Braille, large print or audio. Send your name and address along with a message telling us what format you require to **brailleandlargefonts@slc.co.uk** or you can telephone us on **0141 243 3686**.

Note: this email address and telephone number can only deal with requests for alternative formats of forms and guides.

Section 1 Student details

1.1 Customer Reference Number

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1.2 Student details

Forename

Surname

1.3 Has your name changed from the one shown above?

No – go to **1.4**

Yes – you need to send supporting documents, read  the notes to see what to send. Go to **1.4**.

1.4 Has your marital status changed since your original application for this grant?

No – go to **1.6**

Yes – go to **1.5**

1.5 What is your new marital status?

Tick the box that best describes your status.

I'm now single

I'm now separated



You need to send supporting documents, read the notes to see what to send.

I'm now divorced



You need to send supporting documents, read the notes to see what to send.

My civil partnership has been dissolved



You need to send supporting documents, read the notes to see what to send.

I'm now a widow/surviving civil partner

I'm now married



You need to send supporting documents, read the notes to see what to send.

I'm now in a civil partnership



You need to send supporting documents, read the notes to see what to send.

Section 1 Student details (continued)

1.6 Tick one of the following statements that will apply to you on the first day of the first academic year of your course



- I'll be responsible for a child – go to **1.7**
- I'll have financially supported myself for 3 years or more (this does not have to be 3 consecutive years) – go to **1.7**
- I have not been living in the legal care of my parents for a combined total of at least 13 weeks before turning 25 (you need to send supporting documents, read the notes to see what you need to send) – go to **Section 5**
-  I'll be, or will have been, married or in a civil partnership – go to **1.7**
- I will have been estranged from both my parents for more than 12 months – go to **1.7**
- Both my parents are deceased – go to **1.7**
- None of the above – go to **1.8**

1.7 If you ticked any of the above.

Have you already sent supporting documents to prove each statement ticked?

- No** – read the notes indicated above to see what you need to send. You are an **independent student**, go to **Section 2**.
- Yes** – you are an **independent student**. Go to **Section 2**.

1.8 If you ticked 'none of the above'.

You are a **dependent student**. You need to complete **Section 3** and your parent(s) need(s) to complete **Section 4**. Both/all of you then need to complete **Section 5**.

Section 2 Independent student financial details

Who completes this section?

Only complete this section if you've been instructed to do so at 1.7.

The higher income from you or your partner (if applicable) will be used to assess your entitlement.

Part A

Household income for tax year 2020-21

You must provide estimates of **your** expected income for tax year 2020-21 (6 April 2020 to 5 April 2021).

How to complete Part A

- Give an **estimated** amount for each income type listed below.
- If you will not receive income from any type listed below write 'n/a'.
- Estimates are for the tax year starting **6 April 2020** and ending **5 April 2021**.
- If you leave any question blank in **Part A** we will not be able to process this application.

2.1 Do you currently receive Income Support or Income-related Employment and Support Allowance?

No Yes

2.2 Do you currently receive Universal Credit?

No Yes

2.3 Income from gross salary and wages?

£

2.4 Income from self-employment?

£

2.5 Income from taxable state benefits?

£

2.6 Taxable income from any other source?

Specify each source below.

£

£

£

Section 2 Independent student financial details (continued)

Part B

Household deductions

How to complete Part B

- Give an **estimated** amount for each deduction type listed below.
- If you will not pay a specific type of deduction listed in a question, write 'n/a'.
- Estimates for the tax year starting **6 April 2020** and ending **5 April 2021**.
- If you leave any question blank in **Part B** we will not be able to process this application.

2.7 Deductions towards private pension contributions

Don't include any payments to a workplace pension.

£

2.8 Deductions towards Additional Voluntary Contributions (AVCs)

£

2.9 Deductions towards wages for domestic help due to incapacity

£

2.10 Deductions towards any other employment related expenses

£

2.11 Do you have a partner?

By partner we mean your wife, husband, civil partner or cohabiting partner.

No – go to **Section 5** and sign your declaration.

Yes – your **partner** needs to complete **Section 4**, then **both** of you need to complete **Section 5**.

Section 3 Dependent student financial details

Who completes this section?

Only complete this section if you've been instructed to do so at 1.8.

Data Sharing



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. This information will be used to work out if you are eligible to get Welsh Government Learning Grant Further Education (WGLG FE) based on household income. To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 11 of the accompanying notes.

You can get up to £1,500 for a full-time course or up to £750 for a part-time course, depending on the household income. The higher income from you or your parent(s) will be used to assess your entitlement.

Annual household income	Part-time (275 – 499 hours)	Full-time (500+ hours)
Up to £6,120	£750	£1,500
£6,121 – £12,235	£450	£750
£12,236 – £18,370	£300	£450
£18,371 and above	£0	£0

Part A

Financial information for tax year 2018-19

How to complete Part A

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- If you leave any question blank in **Part A** we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

Do I need to send any evidence of financial details with this application?

No, you don't need to send any evidence of your financial details now, but we may write out to request this at a later date.

What if my income has dropped since 2018-19?

- If your household income has permanently changed since tax year **2018-19**, refer to page 5 of the notes for more information.

If you're self assessed – read page 5 of the notes for more information.

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

3.1 NI number

3.2 Were you in receipt of Income Support or Income-related Employment and Support Allowance?

 Yes No

3.3 Were you in receipt of Universal Credit?

 Yes No

Section 3 Dependent student financial details (continued)

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



Total income from salary/wages



Total income from taxable state benefits

Total income from occupational pension(s)

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

Total income from private pension(s)

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

Yes - give details No – go to **3.5**

£

£

£

£

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

Total non-lump sum amount received

Total lump sum amount received

Yes - give details No – go to **3.6**

£

£

3.6 Did you receive any income from savings and investments?



Total interest from UK banks, building societies and unit trusts



Total income from UK life insurance gains, securities and partnerships



Total income from UK investments and dividends



Total income from foreign investment and dividends

Yes - give details No – go to **3.7**

£

£

£

£

3.7 Did you receive any taxable benefits in kind?



Total income from taxable benefits in kind

Yes - give details No – go to **3.8**

£

3.8 Did you receive any other income during tax year 2018-19 that you have not told us about in **Part A**?

Yes – go to **Part B** No – go to **Section 4**

Section 3 Dependent student financial details (continued)

Part B Any other income

How to complete Part B

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- If you leave any question blank we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

3.9 Did you receive any income from self-employment?



Yes – give details No – go to **3.10**

3.9 Total taxable profit from businesses



£

3.9 Total taxable profit from partnerships



£

3.10 Did you receive any income as a Minister of religion?



Yes – give details No – go to **3.11**

3.10 Total taxable income minus expenses that are not included on your P60 or P11D

£

3.11 Did you receive any other taxable income or lump sums?



Yes – give details No – go to **3.12**

3.11 Total income received

£

3.12 Did you receive any income from property lettings?



Yes – give details No – go to **3.13**

3.12 Total income received

£

3.13 Did you receive any income from UK trusts?



Yes – give details No – go to **3.14**

3.13 Total income received

£

Section 3 Dependent student financial details (continued)

3.14 Did you receive any foreign income?



Total income received

Yes – give details No – go to **3.15**

£

3.15 Did you receive any income from an overseas pension?



Total income received

Yes – give details No – go to **3.16**

£

3.16 Did you receive any other overseas income and gains?



Total income received

Yes – give details No – go to **Section 4**

£

– go to **Section 4**

Section 4 Parent(s)/Partner financial details

How to complete this section

If you are a single parent of the student.

Enter your information as **Parent 1**, leave **Parent 2/student's partner** blank.

If there are two parents in the student's household.

Complete this section with information for both **Parent 1** and **Parent 2/student's partner**. Remember to complete the 'Relationship to student' box.

If you're the student's partner.

Enter your information as **Parent 2/student's partner**. Remember to complete the 'Relationship to student' box, leave **Parent 1** blank. **Read page 5 of the notes for more information.** 

If you're self assessed – read page 5 of the notes for more information. 

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

Data Sharing



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. This information will be used to work out if the student is eligible to get Welsh Government Learning Grant Further Education (WGLG FE) based on household income. To find out more about how your information is used and why, make sure you read our Information Usage Summary on page 11 of the accompanying notes.

The student can get up to £1,500 for a full-time course or up to £750 for a part-time course, depending on the household income. The higher income from both parents or the student will be used to assess the student's entitlement.

Annual household income	Part-time (275 – 499 hours)	Full-time (500+ hours)
Up to £6,120	£750	£1,500
£6,121 – £12,235	£450	£750
£12,236 – £18,370	£300	£450
£18,371 and above	£0	£0

Personal details

Parent 1

Relationship to student

First name

Family name

National Insurance number
 - -

Date of birth
 Day - Month - Year **go to Part A**

Parent 2/student's partner

Relationship to student

First name

Family name

National Insurance number
 - -

Date of birth
 Day - Month - Year **go to Part A**

Section 4 Parent(s)/Partner financial details (continued)

Part A

Financial information for tax year 2018-19

How to complete Part A

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- If you leave any question blank in **Part A** we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

Do I need to send any evidence of financial details with this application?

No, you don't need to send any evidence of your financial details now, but we may write out to request this at a later date.

What if my income has dropped since 2018-19?

 If your household income has permanently changed since tax year **2018-19**, refer to page 5 of the notes for more information.



	Parent 1 Tax year 2018-19	Parent 2/student's partner Tax year 2018-19
4.1 Were you in receipt of Income Support or Income-related Employment and Support Allowance?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
4.2 Were you in receipt of Universal Credit?	<input type="checkbox"/> No <input type="checkbox"/> Yes	<input type="checkbox"/> No <input type="checkbox"/> Yes
4.3 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	<input type="checkbox"/> No – go to 4.4 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 4.4 <input type="checkbox"/> Yes – give details
 Total income from salary/wages	£ <input type="text"/>	£ <input type="text"/>
 Total income from taxable state benefits	£ <input type="text"/>	£ <input type="text"/>
Total income from occupational pension(s) If you receive a lump sum pension, only declare the amount you received that you paid tax on.	£ <input type="text"/>	£ <input type="text"/>
Total income from private pension(s) If you receive a lump sum pension, only declare the amount you received that you paid tax on.	£ <input type="text"/>	£ <input type="text"/>

Section 4 Parent(s)/Partner financial details (continued)

	Parent 1 Tax year 2018-19	Parent 2/student's partner Tax year 2018-19
4.4 Did you receive any income from a state retirement pension?	<input type="checkbox"/> No – go to 4.5 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 4.5 <input type="checkbox"/> Yes – give details
Total non-lump sum amount received	£ <input type="text"/>	£ <input type="text"/>
Total lump sum amount received	£ <input type="text"/>	£ <input type="text"/>
4.5 Did you receive any income from savings and investments?	<input type="checkbox"/> No – go to 4.6 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 4.6 <input type="checkbox"/> Yes – give details
Total interest from UK banks, building societies and unit trusts	£ <input type="text"/>	£ <input type="text"/>
Total income from UK life insurance gains, securities and partnerships	£ <input type="text"/>	£ <input type="text"/>
Total income from UK investments and dividends	£ <input type="text"/>	£ <input type="text"/>
Total income from foreign investment and dividends	£ <input type="text"/>	£ <input type="text"/>
4.6 Did you receive any taxable benefits in kind?	<input type="checkbox"/> No – go to 4.7 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 4.7 <input type="checkbox"/> Yes – give details
Total income from taxable benefits in kind	£ <input type="text"/>	£ <input type="text"/>
4.7 Did you receive any other income during tax year 2018-19 that you have not told us about in Part A ?	<input type="checkbox"/> No – go to Part C <input type="checkbox"/> Yes – go to Part B	<input type="checkbox"/> No – go to Part C <input type="checkbox"/> Yes – go to Part B

Section 4 Parent(s)/Partner financial details (continued)

Part B

Any other income

How to complete Part B

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** income amounts.
- Any amounts given must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- If you leave any question blank we will not be able to process this application.
- If you don't receive a specific type of income listed in a question, write 'n/a'.

	Parent 1	Parent 2/student's partner
	Tax year 2018-19	Tax year 2018-19
4.8  Did you receive any income from self-employment?	<input type="checkbox"/> No – go to 4.9 <input type="checkbox"/> Yes – give details	<input type="checkbox"/> No – go to 4.9 <input type="checkbox"/> Yes – give details
4.8  Total taxable profit from businesses	£ <input type="text"/>	£ <input type="text"/>
4.8  Total taxable profit from partnerships	£ <input type="text"/>	£ <input type="text"/>
4.9 Did you receive any income as a Minister of religion?	Tax year 2018-19 <input type="checkbox"/> No – go to 4.10 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 4.10 <input type="checkbox"/> Yes – give details
4.9  Total taxable income minus expenses that are not included on your P60 or P11D	£ <input type="text"/>	£ <input type="text"/>
4.10  Did you receive any other taxable income or lump sums?	Tax year 2018-19 <input type="checkbox"/> No – go to 4.11 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 4.11 <input type="checkbox"/> Yes – give details
Total income received	£ <input type="text"/>	£ <input type="text"/>
4.11  Did you receive any income from property lettings?	Tax year 2018-19 <input type="checkbox"/> No – go to 4.12 <input type="checkbox"/> Yes – give details	Tax year 2018-19 <input type="checkbox"/> No – go to 4.12 <input type="checkbox"/> Yes – give details
Total income received	£ <input type="text"/>	£ <input type="text"/>

Section 4 Parent(s)/Partner financial details (continued)

4.12 Did you receive any income from UK trusts?



Parent 1

Tax year 2018-19

- No – go to **4.13**
- Yes – give details

£

Total income received

Parent 2/student's partner

Tax year 2018-19

- No – go to **4.13**
- Yes – give details

£

4.13 Did you receive any foreign income?



Tax year 2018-19

- No – go to **4.14**
- Yes – give details

£

Total income received

Tax year 2018-19

- No – go to **4.14**
- Yes – give details

£

4.14 Did you receive any income from an overseas pension?



Tax year 2018-19

- No – go to **4.15**
- Yes – give details

£

Total income received

Tax year 2018-19

- No – go to **4.15**
- Yes – give details

£

4.15 Did you receive any other overseas income and gains?



Tax year 2018-19

- No – go to **Part C**
- Yes – give details

£

Total income received

go to **Part C**

Tax year 2018-19

- No – go to **Part C**
- Yes – give details

£

go to **Part C**

Section 4 Parent(s)/Partner financial details (continued)

Part C

Income deductions

How to complete Part C

- Answer every question.
- Where you answer 'Yes' to a question you must give **gross** deduction amounts.
- Any amounts given must be for the tax year starting **6 April 2018** and ending **5 April 2019**.
- If you leave any question blank in **Part C** we will not be able to process this application.
- If you don't receive a specific type of deduction listed in a question, write 'n/a'.

4.16 Did you pay any private pension contributions?

Don't include any payments to a workplace pension.

Total amount you paid

Parent 1

Tax year 2018-19

No – go to **4.17**

Yes – give details

£

Parent 2/student's partner

Tax year 2018-19

No – go to **4.17**

Yes – give details

£

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

Total amount you paid

Tax year 2018-19

No – go to **4.18**

Yes – give details

£

Tax year 2018-19

No – go to **4.18**

Yes – give details

£

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



Total amount on which you claimed tax relief

Tax year 2018-19

No – go to **Section 5**

Yes – give details

£

go to **Section 5**

Tax year 2018-19

No – go to **Section 5**

Yes – give details

£

go to **Section 5**

Section 5 Declarations

How to complete Section 5.

If you are an independent student with no partner.

Complete the Student Declaration below, leave the Parent/Partner Declaration blank.

If you are an independent student with a partner.

You complete the Student Declaration, your partner needs to complete the Parent 2/student's partner Declaration below.

If you are a dependent student in a single parent household.

You complete the Student Declaration, the parent who completed Section 4 needs to complete the Parent 1 Declaration.

If you are a dependent student in a two parent household.

You complete the Student Declaration, the parent who completed Section 4 as Parent 1 needs to complete the Parent 1 Declaration and the parent who completed Section 4 as Parent 2 needs to complete the Parent 2/student's partner Declaration.

Student Declaration

By signing this declaration you are confirming that:

- the information you will give on this form is correct and complete to the best of your knowledge and belief;
- you will submit supporting evidence in accordance with the accompanying notes;
- you understand that any attempt to dishonestly obtain this grant shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- where you have provided any personal information in relation to a third party, you have informed them of this.

Student full name (in BLOCK CAPITALS)

Today's date

Day			-	Month			-	Year				
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Student signature

Parent/Partner Declaration

By signing and dating this declaration you confirm that:

- the information given on this form is correct and complete to the best of your knowledge and belief;
- you understand that any attempt to dishonestly obtain this grant shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- you have read and understood these statements.

Parent 1

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				
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Parent 2/student's partner

Full name (in BLOCK CAPITALS)

Signature

Today's date

Day			-	Month			-	Year				
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Where do I send my completed form and documents?

Return your completed form and supporting evidence to the address below:

**Student Finance Wales
FE Customer Services
PO Box 5597
Glasgow
G52 9BS**

Check the postage

Make sure that you've included all evidence with your completed application, had it weighed and paid the correct postage costs.

Remember to ask for proof of postage!