

2020/21

PN1

New Student Application for Student Finance

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

Your forename(s)

Your surname

If you have applied for student finance before,
please provide your Customer Reference Number

You should complete this form if you are starting one of the following courses:

- a full-time or sandwich course of higher education;
- a full-time Initial Teacher Education (ITE) course;
- a diploma or degree course in a health related discipline and you are eligible to apply for an **income assessed** bursary from the National Health Service (NHS), Department of Health (DoH) or the Student Awards Agency Scotland (SAAS).

We have provided guidance notes to help you so please refer to these each time you see this icon. 

You will have to send evidence with your application whenever you see this icon. 
Details about the evidence can be found in the guidance notes.

Before completing this form, you should read the Privacy Notice on page 20 of the accompanying notes.

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. For more information about this, read our Privacy Notice. Please contact the university or college if you require further information about their bursaries and scholarships.

Deadline

To make sure you receive your first payment at the start of term, you **must** return this form and all of the evidence we need by **15 May 2020**. We will do our best to process your application as soon as possible, however if the deadline date has passed your first payment may not be ready for the start of term.

If your application form is returned more than 9 months from the start of your academic year it won't be processed, and you may lose your full entitlement to student finance for this academic year.



Section 1 - finance available

If you start your course on or after 1 August 2018 you could get:

- Tuition Fee Loan
- Maintenance Loan
- Welsh Government Learning Grant
- Special Support Grant

If you started your course before 1 August 2018 you could get:

- Tuition Fee Loan
- Maintenance Loan
- Fee Grant
- Welsh Government Learning Grant
- Special Support Grant

Extra help

You can also apply for additional student finance:

- Adult Dependants' Grant
- Childcare Grant
- Parents' Learning Allowance
- Disabled Students' Allowances
- Bursaries and Scholarships
- Travel Grant

You can apply in 5 easy steps

(Depending on your circumstances you may not need to complete all the steps)

Step

1

For all students

- Complete sections 2–6;
- Remember if you are applying for a loan you need to tell us how much you want by completing the loan request section on page 17;
- You **do not** need to complete section 6 if you are only applying for a Tuition Fee Loan and/or a Fee Grant.



If you **only** want to apply for a Tuition Fee Loan, Fee Grant or a Maintenance Loan that is not based on household income you can go directly to **Step 5**. If you are starting a full-time distance learning course on or before 1 August 2018 (for reasons not relating to disability) you can only apply for a Tuition Fee Loan and a Fee Grant.

Step

2

For students who want to apply for student finance based on household income

- Complete sections 7 and 8;
- If you want to apply for Special Support Grant complete section 9.

Step

3

For students who have dependants

- Complete section 10;
- You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.



If you are a single independent student go directly to **Step 5**.

Step

4

For students who want to apply for student finance based on household income

- Complete section 11;
- Depending on your answers in section 11 you may need to ask your **parent(s) or partner** to provide details about their income in section 12 so we can work out what your full entitlement to student finance will be.

Step

5

For all students

- Make sure you have read and signed the Terms and Conditions on pages 25 and 26
- If you asked someone to complete section 12, make sure that they have signed **their declarations on page 35**.

Section 1 - finance available

Continued

Other student finance available

Childcare Grant

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

- complete and return this form **and**
- complete an Application for Help with Childcare Costs (CCG1).

You can download the CCG1 form at:
www.studentfinancewales.co.uk

Tick the box if you want us to send you a CCG1 form instead.

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 (DSA slim).

You can download the DSA slim form at:
www.studentfinancewales.co.uk

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

What if I have further questions?

If you have further questions you can:

- visit: **www.studentfinancewales.co.uk** or
- call us on **0300 200 4050**

Where do I send my form?

Return this form to us: **Student Finance Wales**
PO Box 211
Llandudno Junction
LL30 9FU



Remember to pay the correct postage.

Section 2 - personal details

a Personal details

Title Mr Mrs Miss Ms

Forename(s)

Surname

If you have a double-barrelled surname please ensure you put both parts of your surname with a hyphen in between, if applicable.

Any other names you may be known by

Sex Male Female

Date of birth

Day Month Year

Please complete the following questions with the details exactly as stated on your birth certificate or passport.

Place of birth

(the name of the town or village)

Nationality

b1

Identity evidence details

Do you hold a valid UK passport?

Yes No

if 'No' go to b2

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

Provide the following details exactly as stated on your **UK passport**, which must be **currently valid and not expired** (this is the easiest way for you to verify your identity and means you **do not need to send us your passport**).

Passport number

Forename(s)

Surname

Date of issue

Day Month Year

Date of expiry

Day Month Year

b2

If you don't have a valid UK passport, you must send your original **non-UK passport** or **Biometric Residence Permit** or your original **UK birth or adoption certificate**.

Previous loans

c Have you ever had any loans from the Student Loans Company Limited (SLC)?

Yes No

if 'No' go to d

If 'Yes', are you behind with the repayments?

Yes No

Section 2 - personal details

Continued

Contact details

- d Please give your current home address. If you know it, please also give your term-time correspondence address. n

Home address

Term-time address

Postcode

Postcode

Home phone number

Date on which you will move to your term-time address

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"/>

Mobile phone number

Email address

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

- English
 Welsh

- e Did you move to Wales wholly or mainly for the purpose of receiving Higher Education?

Yes No

if 'Yes' contact Student Finance Wales

Armed Forces

- f Are you a member of the Armed Forces serving outside Wales? n e Yes No

Are you a family member of someone in the Armed Forces serving outside Wales? (for example: spouse or child) n e

Yes No

Current relationship status

- g Tick one box:

Single

Living with a partner n

Married/civil partnership

Please give the date of marriage/civil partnership

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"/>

 e

Separated e

Divorced/dissolved civil partnership e

Widowed/surviving civil partner e

Section 3 - residence

Nationality

a1 Are you a UK national? Yes No **if 'Yes' go to c1**

a2 Are you an EU national? Yes No **if 'Yes' go to c2**

a3 Are you the child of a Swiss national? Yes No **if 'No' go to b1**

a4 Will your Swiss national parent be living in the UK on the first day of your academic year? Yes No **if 'Yes' go to c2**

Residence status

b1 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? Yes No **if 'No' go to b2**

If 'Yes', please give details below. Yes No

You should also give details of your previous studies

If you are currently working, are you going to continue working during your studies? Yes No

If 'Yes', please give details. Yes No

go to c2

b2 Are you the child of a Turkish worker who is working in the UK? Yes No **if 'Yes' go to c2**

b3 Do you have 'settled status' in the UK? Yes No **if 'No' go to b4**

If 'Yes', give the date you received this status.

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"/>

go to c2

b4 Have you or your:
 • husband, wife, civil partner; or
 • parent(s), step-parent;
 been granted 'refugee status' by the UK Government? Yes No **if 'No' go to b5**

If 'Yes', and if applicable, give the following:

Home Office reference number

Date this status is due to expire

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"/>

go to c2

Section 3 - residence

Continued

- b5** Have you or your husband, wife, civil partner or parent(s) or a step-parent been granted 'leave to enter or remain' as a Stateless Person? Yes No **if 'No' go to b6**

If 'Yes', and if applicable, give the following:

Home Office reference number

Date this status is due to expire

Day Month Year

go to c2

- b6** Have you or your husband, wife, civil partner or parent(s) or a step-parent been given:
- '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
 - '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 European Convention on Human Rights (ECHR); or
 - Discretionary Leave where no application for asylum has been made; or
 - Humanitarian Protection? Yes No **if 'No' go to b7**

If 'Yes', and if applicable, give the following:

Home Office reference number

Date this status is due to expire

Day Month Year

go to c2

- b7** Have you been granted 'leave to enter or remain' in the UK under section 67 of the Immigration Act 2016, or are you the dependant child of someone who has? Yes No

If 'Yes', and if applicable, give the following:

Home Office reference number

Date this status is due to expire

Day Month Year

go to c2

! If you answered 'No' to all of the residency and nationality questions in this section you are **not** eligible for student finance from Student Finance Wales. Do not continue with this application.


Section 3 - residence

Continued

Residence history

C1 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? Yes No

go to c2

C2 Tell us all of your addresses for the **three** years prior to the start of your academic year. For example: if your course starts in September 2020, we need to know where you lived between 01/09/2017 and 01/09/2020. Please do not give any term time addresses. 
You may be asked to provide evidence of your addresses later.

From

To

Full address

Why were you there? (if address is outside of Wales)

Postcode

Country

From

To

Full address

Why were you there? (if address is outside of Wales)

Postcode

Country

From

To

Full address

Why were you there? (if address is outside of Wales)

Postcode

Country

If you need more space for your answer you should use the additional notes pages at the back of this form.

Section 3 - residence

Continued

- C3** 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?

Yes No

If 'Yes', please give details below.

Full address	From	To	Why did they live there?
	Day/Month/Year	Day/Month/Year	

Section 4 - about your course and your university or college

! In this section, please give details of your first choice university or college and course.

a University or college name and address

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

UCAS personal identification number

UCAS university or college code

UCAS campus code (if applicable)

Course name

b1 If you are following a combined studies or modular course, please list all subjects being studied.

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

UCAS course code

Qualification you expect to gain (for example BSc Physics)

Course start date

Month	Year
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Course end date

Month	Year
<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Course length (years)

b2 Year of course

<input type="checkbox"/> Foundation - go to c	<input type="checkbox"/> Third year
<input type="checkbox"/> First year - go to c	<input type="checkbox"/> Fourth year
<input type="checkbox"/> Second year	Other (give details)

Are you a direct entrant? **Yes** **No**

Section 4 - about your course and your university or college

Continued

c Full tuition fee amount for this academic year £

If the course is franchised to another university or college, give their address below

 Postcode

d **Course type (please tick one box):**

Full-time undergraduate

Full-time postgraduate Initial Teacher Education (ITE)

Full-time involving a placement (sandwich course)

Full-time foundation degree

Full-time distance learning

Did you start your course before 1 August 2018 and have a disability which prevents you from attending your university/college in person? Yes No

If 'Yes', you must provide evidence that clearly shows you are unable to attend university or college in person for a reason which relates to your disability.

Section 4 - about your course and your university or college

Continued

Term details

e1 Where will you live during this academic year?

Term 1 Living with parent(s) Elsewhere or own home

Term 2 Living with parent(s) Elsewhere or own home

Term 3 Living with parent(s) Elsewhere or own home

e2 Where will you spend most of your time this academic year?

Term 1 University or college Study abroad Work placement

Term 2 University or college Study abroad Work placement

Term 3 University or college Study abroad Work placement

if you have ticked 'University or college' for all 3 terms go to section 5

f Have you been accepted onto the Erasmus exchange scheme? Yes No

if 'yes' and/or you'll be studying abroad go to section 5

Section 4 - about your course and your university or college

Continued

Placement details

g Where will your placement be?

- Abroad
- UK
- Don't know

Placement name and address

	Postcode

Is the placement:

- paid
- unpaid

If 'unpaid', please tick which type:

- a hospital, Public Health Service Laboratory or with a Clinical Commissioning group;
- a Special Health Authority, the National Health Service Commissioning Board, the National Institute for Health and Care Excellence, the Health and Social Care Information Centre, Local Health Board, Health Board, Special Health Board or Health and Social Services Board;
- a Local Authority carrying out its duties relating to health, welfare or caring for children and young people, a voluntary organisation providing facilities or carrying out similar activities or a Local Authority acting in the exercise of public health functions;
- the prison or probation sector or after-care services;
- unpaid research in a UK or overseas institution; or
- an unpaid placement that is not listed above.

Section 5 - previous financial support and other information

Previous study

a1 Have you attended any full-time, ITE or sandwich courses of Higher Education since you left school? Yes No

a2 Have you been awarded an honours degree from a UK university? Yes No

a3 If you answered 'Yes' to either a1 or a2, please give course details below.
Do not list A Level/AS Level examinations or equivalent.

Title of course (for example, BA History or BA Honours History)	Full-time, Part-time or Full-time distance learning	Name of university or college	Date you started Month/Year	Date you left Month/Year	Did you finish this course? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you did not finish any course listed above, why was this?

Section 5 - previous financial support and other information

Continued

- b** Have you applied for financial support for Higher Education before (for example, a grant or loan, tuition fees or bursary including support for fees) from a Local Authority or any other organisation in the UK (for example, Department of Health)?

Did you apply for support? (Tick 'Yes' even if you didn't receive it) Yes No **if 'No' go to c**

Give details below.

Name of the Local Authority or organisation you applied to	What type of support did you receive?	Period the support covered	
		from	to
<input type="text"/>	<input type="text"/>	Month/Year <input type="text"/>	Month/Year <input type="text"/>
<input type="text"/>	<input type="text"/>	Month/Year <input type="text"/>	Month/Year <input type="text"/>
<input type="text"/>	<input type="text"/>	Month/Year <input type="text"/>	Month/Year <input type="text"/>

If any of the periods of support you have given above involved a period of suspended study where you did not receive any support give the suspension date periods below and give the reasons why you suspended study. For example, if you received support from 2006 to 2011 but between 2007 and 2008 you did not receive support because you suspended study that year.

- c** In this academic year, are you eligible to apply for any bursary or award, excluding a social work bursary from any of the following?

- National Health Service (NHS)
- Department of Health (DoH)
- Student Awards Agency Scotland (SAAS)

Yes No

If 'Yes', is this bursary or award **Income assessed**

Non-income assessed

Section 6 - your UK bank or building society account details

If you are only applying for a Tuition Fee Loan and/or a Fee Grant you do not need to complete this section.

This account must be in your own name and be able to accept direct credits.

Please note that missing or incorrect bank or building society details will result in your Maintenance Loan, bursary (if applicable) or any grant payments being delayed.

Sort code

 - -

Account number

Building society roll number

loan request section

If you are applying for a Maintenance Loan, Tuition Fee Loan (or both) you should complete this section to tell us how much you want to apply for.

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.

Maintenance Loan

Amount of Maintenance Loan you would like to apply for:

Tick the box if you would like to apply for the maximum available to you

If you wish to apply for less than the maximum available to you, please state the amount

 £

Tuition Fee Loan

Make sure you find out from your university or college how much they will be charging before you apply for a Tuition Fee Loan. To find out how much you can apply for visit:

www.studentfinancewales.co.uk

Amount of Tuition Fee Loan you would like to apply for:

Tick the box if you would like to apply for the maximum available to you

If you wish to apply for less than the maximum available to you, please state the amount

 £

Contact details

Please give the names and addresses of **two** contacts. The contacts you give **should live at different addresses** and will only be contacted if, for example, you move address and do not inform us. You **must** inform your contacts that you are providing us with their details.

Contact 1

Contact 2

Section 7 - 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.

- a1** Will you be aged 25 or over on the first day of the academic year? Yes No
- a2** Have you been married or in a civil partnership at any time before the first day of the academic year? Yes No
- a3** Will you have care of a person under the age of 18 on the first day of the academic year? Yes No

if you have ticked 'Yes' in any of any of the boxes in question 'a' go to section 8. If you have ticked 'No' go to question 'b'

b 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 from (have no contact with) your parents and this will not change
- If you start your course on or after 1 August 2018** - 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.
- If you started your course before 1 August 2018** - At any point from the age of 16 to the start of your course, you have not been under the legal care of your parents; and, for three months or more, you have been in the custody or legal care of, or have been given accommodation by, a Local Authority
- Both your parents are deceased
- You have applied for student finance before, and the parent who was assessed for a contribution 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 in question 'b' go to section 8

Section 7 - dependent and independent students

Continued

C Have you supported yourself financially for a total of three years or more prior to the start of the first academic year of your course? Yes No

If 'No' you are a dependent student. go to section 8

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

Name and address of your employer or your benefit office	Did you work full or part-time?	From Month/Year	To Month/Year	Amount of salary, wages or benefit you received (state whether it was weekly, monthly or yearly) <input type="checkbox"/>

Section 8 - student financial details

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

Unearned income

a 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

Estimate the total taxable **unearned** income, before deductions, that you expect to receive during this academic year.

£

What is the source of this income?

Payments from an employer

b Will you be employed during the academic year 2020/21? Yes No **if 'No' go to d**

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

Yes No **if 'No' go to d**

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

£

c 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

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



The child's income includes their income from all sources after income tax and social security contributions in tax year 2018-19. Do not include any income from Child Benefit or Child Tax Credits.

Child's full name	Date of birth <input type="text"/>	Relationship to you	Who will they live with?	Child's income in 2018-19 <input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Section 9 - Special Support Grant

You may be eligible for a Special Support Grant instead of a Welsh Government Learning Grant depending on your circumstances.

a To apply for a Special Support Grant tick the box(es) that are relevant to you. 
You must send supporting evidence with your application. 

- I'm a lone parent (or a lone foster parent) with a child, or young person aged under 20 who is in full-time education below higher education level
- I have a partner who is also a full-time student, and one or both of us are responsible for a child, or young person aged under 20 who is in full time education below higher education level
- I have a disability and qualify for the Disability Premium or Severe Disability Premium
- I'm deaf and qualify for Disabled Students' Allowances
- I have been treated as incapable of work for a continuous period of at least 28 weeks
- I have a disability and qualify for Income-Related Employment and Support Allowance
- I'm waiting to go back to a course having taken agreed time out from that course due to an illness or caring responsibility that has now ended
- I'm aged 60 or over
- I'm entitled to Housing Benefit or the housing element of Universal Credit
- I'm entitled to Personal Independence Payment (PIP)
- I'm entitled to Disability Living Allowance (DLA)
- I'm entitled to Armed Forces Independence Payment (AFIP)
- None of the above

 If none of the above apply to you, or you can't provide the necessary evidence you won't be eligible for a Special Support Grant. You'll be assessed for a Welsh Government Learning Grant instead.

Section 10 - Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

You only need to complete this section if you are a student who has children or adult dependants and you want to apply for financial help in relation to them

a Are you a lone parent? Yes No **if 'Yes' go to d**

b Are you under 25, living with a partner and applying for a Childcare Grant or Parents' Learning Allowance? Yes No **if 'No' go to d**

c Give the total estimated income after Income Tax and National Insurance deductions in this academic year for:

You £ Your partner £

How much of this will be Child Tax Credit or the child element of Universal Credit for this academic year?

You £ Your partner £

! **If you are not applying for Childcare Grant go to e1**

d During the academic year, do you or your partner expect to receive:

- the childcare element of Working Tax Credit or Universal Credit; or
- Tax-Free Childcare from HM Revenue and Customs (HMRC); or
- Childcare Allowance from the NHS?

Yes No

If 'Yes', you can't get Childcare Grant if you receive childcare support from one of these sources **at the same time**. You can only apply for Childcare Grant if you stop claiming support from any of the above sources.

e1 Are you applying for Adult Dependants' Grant? Yes No **if 'No' go to f**

e2 Who is your adult dependant?

husband
wife
civil partner or partner

(if you are aged 25 or over) **go to f**

other adult dependant

e3 Will your 'other adult dependant's' income be more than £3,923 in this academic year? Yes No **If 'Yes' you will not receive Adult Dependants' Grant – go to f**

Section 10 - Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

Continued

e4 Give your adult dependant's income for the 2018-19 tax year.

Income

All salary, wages and self-employed income (including income from property)

 £

All income from pensions, including private, occupational and state

 £

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

All gross taxable income and interest from savings, investments and dividends

 £

Taxable state benefits

 £

All other taxable income

 £

Deductions

Private pension contributions and Additional Voluntary Contributions (AVCs)

 £

Allowable expenses on which tax relief is claimed

 £

f **Only complete this question if you started your course before 1 August 2018**

Give details of financial commitments you have before the start of your course which you, your husband, wife or partner will continue to pay during the academic year.

Please enter the annual amount

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

Section 11 - about your family

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

If you are an **independent student with a partner**, read and sign the **Terms and Conditions** on **pages 25 and 26** and then pass this form to your partner to complete **section 12**.


If you are a **single independent student**, go to the **Terms and Conditions** on **pages 25 and 26**.



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

Mother Father

or

Both N/A

b 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 25 and 26** 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 12**.
If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also complete **section 12**.

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.

Childcare Grant ("CCG")

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

23. 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.
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.

Customer Reference Number

Your full name
(in BLOCK CAPITALS)

Your signature Today's date



The relevant person(s) you indicated in section 11 must complete section 12 as well as the declaration(s) on page 35.

Please pass this form to them now.

If you are a single independent student, please turn to page 36 to finalise your application.

Section 12 - financial details for tax year 2018-19 for parents and partners

Who needs to complete this section?

Section 11 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.

About this section

Section 12 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 21 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? [n](#)

If your household income has dropped by 15% or more since 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.

Before completing this form, you should read the Privacy Notice on page 29 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.

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

Part A – Your personal details

Person 1

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Any previous names you may be known by

Date of birth / /

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 it separately, you can download an Assessment of Financial Circumstances form (PFF2) 2020/21 from: www.studentfinancewales.co.uk and return it to us.

Alternatively, you can have the form sent to you by ticking this box:

Person 1

 Send me a separate form

Person 2

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Any previous names you may be known by

Date of birth / /

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

 Send me a separate form

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

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

Please provide your NI number below:

Person 1

- -

You are now ready to provide your financial information.

[go to Part C](#)

Person 2

I have an NI number

Please provide your NI number below:

Person 2

- -

You are now ready to provide your financial information.

[go to Part C](#)

I do not have an NI number

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](#)

I do not have an NI number

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](#)

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

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

Instructions

- Please give 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? n

Person 1

Yes No
▼

Person 2

Yes No
▼

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.

£

£

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

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

Person 1

Yes No

Person 2

Yes No

a Total non-lump sum amount received

£

£

b Total lump sum amount received

£

£

Q3 Did you receive any income from savings and investments?

Person 1

Yes No

Person 2

Yes No

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

£

£

Q4 Did you receive any taxable benefits in kind?
(for example a company car or private medical insurance)

Person 1

Yes No

Person 2

Yes No

Total income received from taxable benefits in kind

£

£

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 D
 No → Go to Part E

Person 2 Yes → Go to Part D
 No → Go to Part E

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

Part D – Other income

Instructions

- Complete Part D in the same way you completed Part C giving 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"/> n	<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"/> n	<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"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
Q4 Did you receive any income from property lettings? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
Q5 Did you receive any income from UK trusts? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

	Person 1	Person 2
Q6 Did you receive any foreign income? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
Q7 Did you receive any income from an overseas pension? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
Q8 Did you receive any other overseas income and gains? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>

Part E – Income deductions

Instructions

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

	Person 1	Person 2
Q1 Did you pay any private pension contributions?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total amount you paid	£ <input type="text"/>	£ <input type="text"/>
Q2 Did you pay any Additional Voluntary Contributions (AVCs)?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total amount you paid	£ <input type="text"/>	£ <input type="text"/>
Q3 Did you have any allowable expenses on which you claimed tax relief? <input type="checkbox"/> n	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total amount on which you claimed tax relief	£ <input type="text"/>	£ <input type="text"/>

Section 12 - financial details for tax year 2018-19 for parents and partners

Continued

Part F – Your dependants ⁿ

Identify any children who will be wholly or mainly financially dependent on you.

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

Include unearned income for **all** dependants. Only include earned income details for persons aged 16 and over. Do not count casual earnings of persons under 16.

Full name	Date of birth (DD MM YYYY)	Income for the 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	Date of birth (DD MM YYYY)	School, college or university	Course	Are they receiving financial support? If so, from which authority or organisation?

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 I might be prosecuted and financial support withdrawn. Any information provided which is found to be materially inaccurate may be regarded as evidence of an attempt to mislead SLC. In such circumstances, SLC may report the matter to the authorities and/or terminate the student's eligibility for student finance.
- I agree to supply any further information in relation to the applicant's application for financial support that SLC 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

Person 2

Your full name (in BLOCK CAPITALS)

Your signature

Today's date Day Month Year

Deadline

To make sure the student receives their first payment at the start of term, this form must be returned with all of the evidence we need by **15 May 2020**.

We will do our best to process the application as soon as possible, however if the deadline date has passed, the first payment may not be ready for the start of term.



Now pass this form back to the student.

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. If you answer both questions a and b, the information will be used to help the Welsh Ministers develop their policies in the future.

a **Your parents' education** (this includes your natural parents, your adoptive parents, your step-parents, partners of your parents, and your guardians).

Do any of your parents (as defined above) have any higher education qualifications, for example degrees and diplomas or certificates of higher education?

Yes No

b How would you describe your ethnic origin?

White:

- | | |
|---|---|
| <input type="checkbox"/> British (Welsh) | <input type="checkbox"/> British (English) |
| <input type="checkbox"/> British (Scottish) | <input type="checkbox"/> British (Other) |
| <input type="checkbox"/> Irish | <input type="checkbox"/> Any other white background |

Black or Black British:

- | | |
|---|------------------------------------|
| <input type="checkbox"/> African | <input type="checkbox"/> Caribbean |
| <input type="checkbox"/> Any other black background | |

Mixed:

- | | |
|--|---|
| <input type="checkbox"/> White and black African | <input type="checkbox"/> White and black Caribbean |
| <input type="checkbox"/> White and Asian | <input type="checkbox"/> Any other mixed background |

Chinese or other ethnic group:

- | | |
|----------------------------------|------------------------------------|
| <input type="checkbox"/> Chinese | <input type="checkbox"/> Any other |
|----------------------------------|------------------------------------|

Asian or Asian British:

- | | |
|--------------------------------------|---|
| <input type="checkbox"/> Indian | <input type="checkbox"/> Pakistani |
| <input type="checkbox"/> Bangladeshi | <input type="checkbox"/> Any other asian background |

Additional notes

If you are providing extra information please clearly mark what section and question the information is about.

Additional notes


If you are providing extra information please clearly mark what section and question the information is about.

Additional notes

If you are providing extra information please clearly mark what section and question the information is about.

Checklist

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

- Fully answered all questions that apply to you.
- Enclosed all evidence items. 
- Completed the Loan Request section if you are applying for a Maintenance Loan, Tuition Fee Loan or both.
- Signed and dated the relevant Terms and Conditions.
- Asked your parent(s) or partner to complete section 12 if you are applying for student finance based on your household income.

What happens next

It can take at least 6 weeks to assess your application and all the relevant evidence. We'll then send you a letter showing the amount of financial support you'll receive.



Please remember to pay the correct postage.

You must return your form to: **Student Finance Wales**
PO Box 211
Llandudno Junction
LL30 9FU