

## Application for New Students Supporting Notes

### About these notes

Use these notes to help you complete your 'Postgraduate Master's Finance Application Form for New Students'.

You can also apply online at [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)

### How to use these notes



Where you see this in your 'Postgraduate Master's Finance Application Form for New Students' it means there's additional information in these notes to help or advise you.

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

These notes are in sections and numbered in the same way as the questions in the application form.

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

### Alternative formats

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

## Section 1 Your details

### 1.1 Change of name

If your name has changed since your passport or birth certificate was issued you need to prove that your name has legally changed.

**You need to send us one of the following:**

- your change of name deed; or
- your marriage certificate or civil partnership documentation; or
- your divorce certificate or dissolution order

### 1.5 National Insurance number

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

If you've never been given a National Insurance number, leave the National Insurance number box blank. We'll contact you if you need to take any action to obtain a National Insurance number. If in the meantime you get a National Insurance number, let us know as soon as possible.

## Section 2 Your previous study

### 2.2 Previous postgraduate qualifications

If you have a:

- Doctoral degree; or
- Master's degree; or
- Integrated Master's degree; or
- an overseas equivalent of any of the above

**you are not eligible to receive Postgraduate Master's Finance.**

If you have a:

- Postgraduate Diploma; or
- Postgraduate Certificate in Education (PGCE); or
- Postgraduate Certificate; or
- Honorary Master's; or
- an overseas equivalent of any of the above

**you may be eligible to receive Postgraduate Master's Finance.**

We don't need any proof of your qualifications right now, but we may ask for these in the future.

## Section 3 Your Postgraduate Master's course

### 3.2 Study type and duration

Postgraduate Master's students can study their course over a varying number of years. All full-time courses will be split over 1 – 2 years, however, part-time courses can last up to 4 years.

This will mainly affect how much funding you receive each year as the total amount you choose to borrow will be split over the duration of your course.

The following courses are eligible for funding from us:

- a full-time course lasting one or two academic years;
- a part-time course lasting two, three or four academic years.

### 3.3 Social Work bursary

Students are not eligible for Postgraduate Master's Finance if they're able to get a social work bursary. If you're unsure if you can apply for this, you need to speak to your university.

If you have applied for this and been rejected you need to send your rejection letter with your application. We can't accept your application without this.

### 3.4 NHS Bursary

Students are not eligible for Postgraduate Master's Finance if they're in receipt of an NHS bursary. If you're unsure if you can apply for this, you need to speak to your university.

## Section 3 Your Postgraduate Master's course – continued

### 3.5 Distance Learning

#### Armed Forces

If you're not studying distance learning due to you or a family member being in the armed forces you must be living in Wales on the first day of the first academic year of your course to be eligible for Postgraduate Master's Finance.

#### **Are you studying on a distance learning course because you or a member of your family are in the armed forces?**

You may be eligible for support to study a distance learning course if you or your family member is currently serving both in and outside of the UK in one of the following:

- The Naval Service (Royal Navy and Royal Marines)
- The Army
- The Royal Air Force
- The Royal Military Police
- The Gurkhas

#### **The following family members will be eligible students:**

- the child/step-child under the age of 25 who is living with of a member of the Armed Forces serving in the UK or overseas
- a spouse or civil partner living with a member of the UK Armed Forces serving in the UK or overseas
- a dependant parent living with either;
  - a child who is a member of the UK Armed Forces serving in the UK or overseas
  - the child's spouse or civil partner who is a member of the UK Armed Forces serving in the UK or overseas

#### **Evidence**

#### **What you need to send**

You need to send a letter confirming your name and your address, or British Forces Post Office address.

If your family member is in the Armed Forces, you need to send a letter confirming the following:

- their name
- their address or British Forces Post Office (BFPO) address
- your name
- their relationship to you

The letter you send must be stamped, signed and dated by the Armed Forces Unit Records Officer. We can't accept a photocopy. We recommend that you use your BFPO address for all correspondence.

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

Students are not eligible for Postgraduate Master's Finance if they're getting a Knowledge Economy Skills (KESS2) Scholarship. If you're unsure if you can apply for this, you need to speak to your university or college.

## Section 4 Your residency information

### 4.2 If you don't have a UK passport or your UK passport has expired.

If it has expired, or is about to expire, you need to send:

- your original birth or adoption certificate

If you can't return your original birth or adoption certificate with your main application form, get it to us as soon as possible.

### 4.3 EU nationals

You need to prove your EU nationality, send us one of the following:

- your passport
- your National Identity card

All evidence items you send must be **originals**.

### 4.4 Family members of EU nationals

You need to prove your family member's EU nationality, send us one of the following:

- your EU family member's passport
- National Identity card

You also need to prove your EU national family member's relationship to you, send us:

- a birth or marriage certificate

All evidence items you send must be **originals**.

## Section 4 Your residency information – continued

### 4.5 Child of a Swiss national

To get Postgraduate Master's Finance as the child of a Swiss national, your Swiss national parent must be living/have lived in the UK on the first day of the first academic year.

The first day of your academic year is:

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

### 4.6 European Economic Area (EEA) national or Swiss national

#### You need to prove your identity, send us:

- your valid passport; or
- your National Identity card; or
- your birth certificate

#### You also need to prove your parent's Swiss nationality, send us:

- your Swiss national parent's valid passport; or
- National Identity card

And evidence of their UK residency, send us a signed letter to confirm your Swiss national parent is living/was living in the UK on the first day of the academic year and one of the following showing both their name and their UK address:

- latest bank statement (paper copies only); or
- latest payslip (showing home address); or
- tenancy agreement/mortgage statement; or
- utility bill (dated within last 3 months); or
- Local Authority correspondence (on headed paper); or
- Government Department correspondence.

All evidence items you send must be **originals**.

#### You need to send:

- a completed Postgraduate Master's Finance UK Employment Status form

The Postgraduate Master's Finance UK Employment Status form is available to download at [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Master's Finance without this additional completed form.

## Section 4 Your residency information – continued

### 4.7 Family member of a European Economic Area (EEA) national or Swiss national

#### You need to send:

- a completed Postgraduate Master's Finance UK Employment Status form

The Postgraduate Master's Finance UK Employment Status form is available to download at [www.studentfinancewales.co.uk/pgfinance](http://www.studentfinancewales.co.uk/pgfinance)

Complete and return this additional form with any supporting documents along with your main application form to ensure that your funding can be in place as soon as possible.

If you can't return your additional form with your main application form, get it to us as soon as possible. We won't be able to confirm if you can get Postgraduate Master's Finance without this additional completed form.

### 4.8 Child of a Turkish worker who is working in the UK

To apply for finance as the child of a Turkish worker, your Turkish parent must be working in the UK on the first day of the first academic year.

You must also be living in the UK on the first day of your course and have lived in the UK, EEA, Turkey or Switzerland for 3 years before the first day of the first academic year of your course.

#### You need to prove your identity, send us:

- your original valid passport

#### You also need to send proof of your Turkish parent's nationality, send us:

- their original valid passport; or
- their national identity card

#### And proof of your relationship send us:

- a birth or marriage certificate

#### You also need to send proof of your Turkish parent's employment in the UK, for example send us:

- a contract of employment

All evidence items you send must be **originals**.

### 4.9 Settled status

'Settled status' means that you can live in the UK permanently without the Home Office placing any restrictions on how long you may remain.

You are free from any restriction if any of the following apply:

- You are a British citizen
- You have a right of 'permanent residence' in the UK
- You have been granted 'indefinite leave to remain'
- You have a right of abode in the UK.

Further information about the right of permanent residence and other immigration issues found at [www.homeoffice.gov.uk](http://www.homeoffice.gov.uk)

#### You need to prove your current status, send us one of the following:

- your Biometric Residence Permit; or
- your UK passport or a letter from the Home Office which confirms your immigration status.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

All evidence items you send must be **originals**.

## Section 4 Your residency information – continued

### 4.10 Refugee status

If you or your:

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

has successfully applied for refugee status in the UK under the terms of the 1951 UN Convention Relating to the Status of Refugees, and you, or they, have been granted refugee status, the Home Office will have sent you, or them, a letter and an immigration status document confirming this.

If you are claiming student finance as the child or step-child of a refugee, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of a refugee, you must have been their husband, wife or civil partner at the time of their application for asylum.

### 4.11 Leave to enter or remain Status

If you or your:

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

has been granted

'Leave to enter or remain' status the Home Office will have sent you, or them, a letter and an immigration status document confirming this.

If you are claiming student finance as the child or step-child of a person granted 'Leave to enter or remain' status, you will only be considered a 'child' if you were under the age of 18 at the time of your parent's application to the Home Office.

If you are claiming student finance as the husband, wife or civil partner of someone who has been granted 'Leave to enter or remain' status, you must have been their husband, wife or civil partner at the time of their application for asylum.

**If you have been granted refugee status, send us:**

- a Home Office letter that confirms your status **and** an immigration status document, for example:
  - your Biometric Residence Permit; or
  - your original passport.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

**If your family member has been granted refugee status, send us:**

- a Home Office letter confirming their status **and** an immigration status document showing their refugee status, for example:
  - their Biometric Residence Permit; or
  - their original passport.

We will only use their Biometric Residence Permit to validate their identity, no other data from it will be used or stored.

**You also need to send us proof of your relationship, send us:**

- a birth or marriage certificate.

All evidence items you send must be **originals**.

**If you have been granted 'Leave to Enter or Remain' status, send us:**

- a Home Office letter that confirms your status **and** an immigration status document, for example:
  - your original passport; or
  - your valid Biometric Residence Permit.

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

**If your family member has been granted 'Leave to enter or Remain' status, send us:**

- a Home Office letter confirming their status **and** an immigration status document, for example:
  - their original passport; or
  - their valid Biometric Residence Permit.

We will only use their Biometric Residence Permit to validate their identity, no other data from it will be used or stored.

**You also need to send us proof of your relationship, send us:**

- a birth or marriage certificate.

All evidence items you send must be **originals**.



## Section 4 Your residency information – continued

### 4.12 Stateless Person

#### **If you have been granted 'Leave to enter or remain' as a Stateless Person, send us**

- a Home Office letter that confirms your status **and** an immigration status document, for example:
  - your Biometric Residence Permit

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

#### **If your family member has been granted 'Leave to enter or remain' as a Stateless Person, send us:**

- a Home Office letter confirming their status **and** an immigration status document, for example:
  - their Biometric Residence Permit;

We will only use their Biometric Residence Permit to validate their identity, no other data from it will be used or stored.

#### **You also need to send us proof of your relationship, send us:**

- a birth or marriage certificate.

All evidence items you send must be **originals**.

### 4.13 Section 67

#### **If you have been granted leave to enter or remain in the UK under section 67 of the Immigration Act 2016 send us:**

- a Home Office letter that confirms your status and an immigration status document, for example:
  - your Biometric Residence Permit

We will only use your Biometric Residence Permit to validate your identity, no other data from it will be used or stored.

#### **If you are the dependant child of somebody who has been granted leave to enter or remain in the UK under section 67 of the Immigration Act 2016, send us:**

- a Home Office letter confirming their status and an immigration status document, for example:
  - their Biometric Residence Permit

We will only use their Biometric Residence Permit to validate their identity, no other data from it will be used or stored.

#### **You also need to send us proof of your relationship, send us:**

- a birth or marriage certificate.

All evidence items you send must be **originals**.

## Section 8 Terms and conditions

### Power of Attorney

If you cannot sign the form it must be signed on your behalf by your attorney. The Power of Attorney letter must be sent with the application before a signature from that attorney will be accepted.

## Section 9 Dependent or independent student

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

Please provide **one** of the following:

- care order confirmation documents
- a letter from 'Foyer' or other supported housing scheme
- a letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.

- 9.2 Over 25 marital status evidence**

If you're **divorced** or **separated**, or if you've been in a **civil partnership which has been dissolved**, you should send us a copy of either:

- decree nisi/absolute
- dissolution order
- a letter from your solicitor confirming your status

If you're widowed or a surviving civil partner, you should send us a copy of your partner's death certificate.

- 9.3 Have you been or are you currently married or in a civil partnership?**

**If you're married or in a civil partnership, send us:**

- your marriage certificate
- your civil partnership documentation

If you're **divorced** or **separated**, or if you've been in a **civil partnership which has been dissolved**, you should send us a copy of either:

- a decree nisi/absolute
- a dissolution order
- a letter from your solicitor confirming your status

If you're widowed or a surviving civil partner, you should send us a copy of your partner's death certificate.

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

Send us:

- the child's/children's original birth certificate(s)
- evidence that you are receiving Child Benefit, Child Tax Credit or the child element of Universal Credit.

## Section 9 Dependent or independent student - continued

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

Send us evidence to show that you've been supporting yourself for at least 36 months, such as:

- P60s
- month 12 or Week 52/53 payslips
- statement of earnings from HM Revenue and Customs (HMRC)
- statement of earnings from employer
- a letter from the local Jobcentre Plus/Department for Work & Pensions (DWP) confirming the periods of any/all benefit entitlement received.

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

Send us:

- a letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. a Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.

**9.7 Your parents live outside the EU and it wouldn't be possible for them to send you money, or assessing their financial circumstances would place them in jeopardy**

Send us:

- a letter signed and dated by a professional person who is not a friend or relative, detailing your situation (e.g. a Doctor). This person must have known you for at least 12 months and be fully aware of your circumstances.

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

Please provide a signed and dated letter from a professional person, i.e a Doctor, Teacher or Social Worker, confirming the following:

- their relationship to you
- the length of time they have known you
- the reasons for your estrangement from your parents
- if reconciliation is likely

**9.9 Are both your parents deceased?**

Send us:

- certified copies of death certificates
- a copy of your birth certificate

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

### 11.1 What is your current marital status?

If you're divorced or separated, or if you've been in a civil partnership which has been dissolved, you should send us a copy of either:

- decree nisi/absolute
- dissolution order
- a letter from your solicitor confirming your status

If you're widowed or a surviving civil partner, you should send us a copy of your partner's death certificate.

### 11.2 Statutory award

A statutory award includes any support paid out of public funds for studying a further/higher education course, for example:

- funding from Student Finance Wales/England/Northern Ireland or Student Awards Agency Scotland
- an NHS Bursary
- a Social Work Bursary

If you receive funding for a course but don't know if you should include it, contact your college or university for more information.

## Section 12 Financial questions

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

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

#### **a Total income from salary / wages**

You should refer to your 2018-19 P60 or final payslip for your income from salary/wages. If as part of your salary or wages for the tax year 2018-19 you received **tips and other payments** that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment.

#### **b Taxable state benefits**

You should refer to your 2018-19 P60 or P45 from the Department of Work and Pensions for your taxable state benefit details. Only include income received for the following benefits:

- Bereavement Allowance/Widow's pension
- Carer's Allowance
- Contribution-based Employment and Support Allowance
- Graduated retirement benefit
- Incapacity Benefit (only include the amount received after 28 weeks of incapacity)
- Industrial Death Benefit
- income support paid to strikers or people involved in a trade dispute
- Jobseeker's Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

Do not include income received from any other benefits or Universal Credit.

#### **c Occupational/private pension**

If you received an occupational or private pension, you should refer to your P60P or annual statement from your pension provider.

## Section 12 Financial questions – continued

**Q3** Did you receive any income from savings and investments?

### **a Income from UK banks, building societies and unit trusts**

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

- gross UK interest (before tax has been deducted)

You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

### **If you did not declare any savings and investment income to HMRC**

Please refer to your bank or building society statements for these figures.

### **b Income from UK life insurance gains, securities and partnerships**

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

- interest from gilt edged and other UK securities – gross amount before tax
- UK life insurance policy etc. gains on which tax was treated as paid
- UK life insurance policy etc. gains on where no tax was treated as paid
- UK life insurance policy etc. gains from voided ISAs
- your share of taxed interest etc.
- total untaxed savings income taxable at 20%
- taxed income taxable at 10%
- taxed income taxable at 20%

### **c Income from UK investments and dividends**

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

- dividends from UK companies
- other dividends
- stock dividends
- non-qualifying distributions and close company loans written off or released
- share schemes – taxable amount

### **d Income from foreign investment and dividends**

Tell us about the amount of interest / income you received from the following savings and investment income type(s):

- foreign dividends
- interest and other income from overseas savings
- dividends from foreign companies
- dividend income received by a person overseas

## Section 12 Financial questions – continued

**Q4 Did you receive any taxable benefits in kind?**

### **P11D**

Add together all the benefits in kind you received and write your total figure on the form. The following list provides a breakdown of what we want you to include as part of your total income from 'taxable benefits in kind' during the 2018-19 tax year:

- assets placed at employees disposal (cars, property, goods or other assets)
- payments made on behalf of employee
- vouchers and credit cards
- living accommodation
- mileage allowance and passenger payments
- total cash equivalent of all cars/vans made available
- total cash equivalent of fuel for all cars/vans made available
- cash equivalent the borrower of loans after deducting any interest paid by the borrower
- private medical treatment or insurance
- qualifying relocation expenses payments and benefits
- services supplied
- other items (including subscriptions and professional fees)
- expenses payments made to, or on behalf of, the employee

### **Part B Other income**

**Q1 Did you receive any income from self-employment?**

#### **a Total adjusted profit from businesses**

Total adjusted profits from this business (aggregated for multiple self employments)

#### **b Total adjusted profit from partnerships**

Include:

- share of total taxed and untaxed income other than that taxable at 10% and 20%
- your share of total adjusted profit from the partnerships

**Q2 Did you receive any income as a Minister of religion?**

Taxable income minus expenses (Ministers of religion) that are not included in your P60 or P11D

## Section 12 Financial questions – continued

**Q3 Did you receive any other taxable income or lump sums?**

Add together any income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- other taxable income – before expenses and tax taken off
- foreign earnings not taxable in the UK
- taxable lump sums
- lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions
- redundancy and other lump sums and compensation payments

**Q4 Did you receive any income from property lettings?**

Add together any income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- income from UK property
- income from foreign property or land

**Q5 Did you receive any income from UK trusts?**

Add together any income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- discretionary income payment from a UK resident trust – net amount
- discretionary income payment from a UK resident trust – total payments from settlor-interested trusts
- non-discretionary income entitlement from a trust – net amount of non-savings income
- non-discretionary income entitlement from a trust – net amount of savings income
- non-discretionary income entitlement from a trust – net amount of dividend income
- income chargeable on settlors
- income from UK estates
- foreign estate income



## Section 12 Financial questions – continued

**Q6** Did you receive any foreign income?

Add together any income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- total taxable amount of overseas pensions, social security benefits and royalties etc.
- total taxable amount of all other income received by a person abroad and any remitted 'ring fenced' foreign income
- gains on disposals of holdings offshore funds and discretionary income from non-resident trusts
- benefit received from an overseas trust, company or other person
- gains on foreign life policies (amount of gain)

**Q7** Did you receive any income from an overseas pension?

Add together any income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum
- amount of unauthorised payment from a pension scheme, not subject to surcharge
- total amount of unauthorised payment from a pension scheme, subject to surcharge
- taxable short service refund of contribution (overseas pension schemes only)
- taxable lump sum death benefit payment (overseas pensions only)

**Q8** Did you receive any other overseas income and gains?

Add together the income types below that you received during the 2018-19 tax year and tell us your total figure on the form:

- amount of omissions (exemptions under transfer of foreign assets)

### Part C Income deductions

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

Add together all allowable expenses below which you had during the 2018-19 tax year and tell us your total figure on the form:

- total amount of allowable expenses
- foreign tax for which tax credit relief not claimed
- business travel and subsistence expenses
- fixed deductions for expenses
- professional fees and subscriptions
- other expenses and capital allowances

## Section 13 Non-UK taxable income

### Non-UK taxable income

Send us evidence of your income for tax year 2018-19.

For example, send us:

- a P60
- Month 12 wageslip or Week 53 wageslip
- a photocopy of your full finalised online tax return
- annual statement from your pension or insurance company

This evidence must be certified translated into English or Welsh.