



Financial Details
Form



www.studentfinancewales.co.uk/ema

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.
- Section 2 will ask about your household financial details. Depending on your situation, either your parent(s)/guardian(s) or you (and your partner, if you have one) will need to complete this section. Whoever completes this section will need their National Insurance number to hand.
- Section 3 contains your agreements 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 evidence we will need it before your application can be fully processed. Any missing evidence 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 icon, it means that you need to send **supporting evidence**. These notes will tell you exactly what we need from you. We will accept **photocopies** of your evidence.

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 9 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 EMA: **www.studentfinancewales.co.uk/ema**

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	
1.2	Student details	Forename
		Surname
1.3	Do you live with your parents?	 Yes – your parent(s)/guardian(s) need to complete Section 2 then both of you need to complete Section 3. No – you (and your partner, if you have one) need to complete Section 2 then both of you need to complete Section 3

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Section 2 Financial details

Part A

Section 2 is divided into four parts. Read the following for a quick summary of each part.

Part A

Tell us your name and some other personal information including your National Insurance number.

Part B

Answer every question.

Part C

Only complete if instructed. Part D

Answer every question.

Who completes this section?

Question **1.3** told you who needs to complete this section for your application. How to complete this section

If you are a single parent/guardian of the student

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

If there are two parents/guardians in the student's household

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

If you're an independent student with a partner

Enter your information as Person 1, your partner needs to enter their information as Person 2.

If you're an independent student without a partner

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

If you're self assessed – read page 3 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 EMA 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 9 of the accompanying notes.

2.1 Personal details

Person 2 Person 1

Relationship to student (if you're the student write n/a)	Relationship to student							
Forename	Forename							
Surname	Surname							
Please provide your NI number below	Please provide your NI number below							
Date of birth	Date of birth							
Day Month Year go to Part B	Day Month Year go to Part B							



Part B

Financial information for tax year 2020-21

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 2020 and ending 5 April 2021.
- If you leave any question blank in **Part B** 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'.

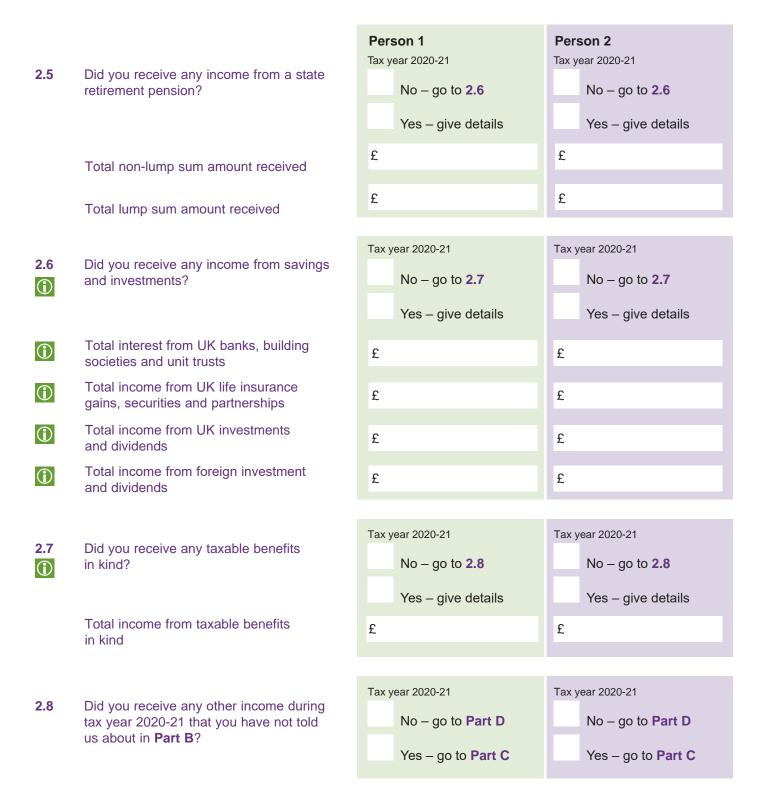
Do I need to send any evidence of financial details with this application?

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 2020-21?

If your household income has permanently changed since tax year **2020-21**, refer to page 3 of the notes for more information.

		Person 1	Person 2
2.2	Were you in receipt of Income Support or Income-related Employment and Support Allowance?	No Yes	No Yes
2.3	Were you in receipt of Universal Credit?	Tax year 2020-21	Tax year 2020-21
		Yes	Yes
2.4	Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	Tax year 2020-21 No – go to 2.5 Yes – give details	Tax year 2020-21 No – go to 2.5 Yes – give details
(i)	Total income from salary/wages	£	£
①	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.	£	£



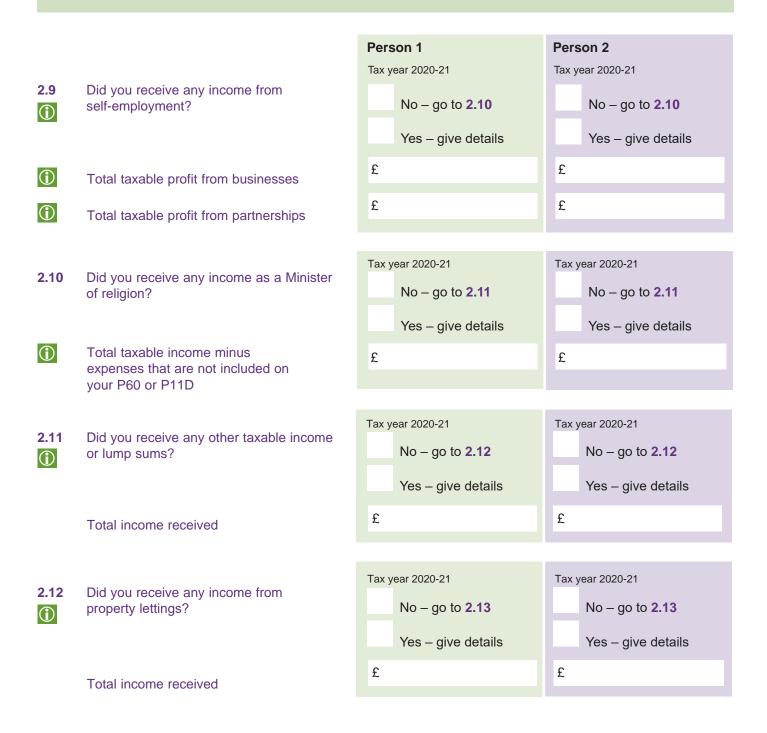


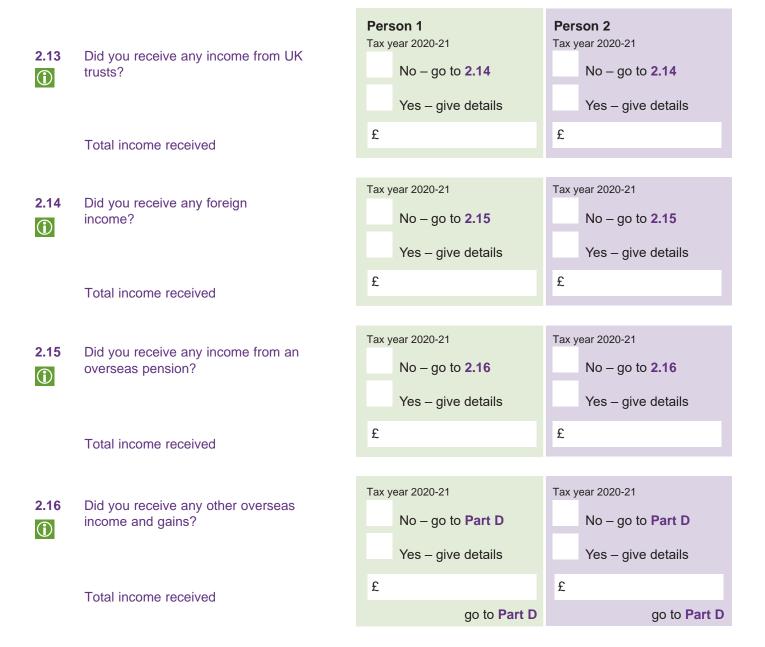
Part C

Any other income

How to complete Part C

- 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 2020 and ending 5 April 2021.
- 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'.





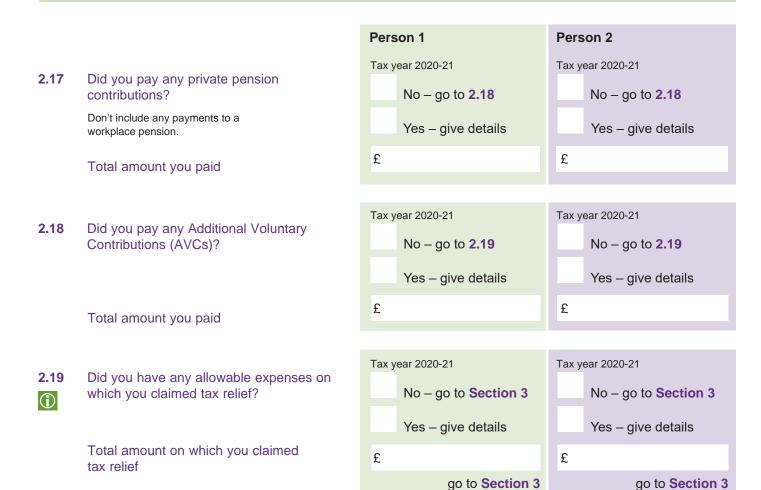


Part D

Income deductions

How to complete Part D

- 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 2020 and ending 5 April 2021.
- If you leave any question blank in Part D 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'.



Section 3 Agreements

How to complete Section 3.

If you are an independent student with no partner.

Complete the Student Agreement below, leave the Parent/Guardian/Partner Agreement blank.

If you are an independent student with a partner.

You complete the Student Agreement, your partner needs to complete the Parent/Guardian/Partner Agreement as Person 2.

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

You complete the Student Agreement, the parent who completed Section 3 needs to complete the Parent/ Guardian/Partner Agreement as Person 1.

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

You complete the Student Agreement, and your parents need to complete both Person 1 and Person 2 of the Parent/Guardian/Partner Agreement.

Student Agreement ①



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 EMA 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					
Student signature						

Parent/Guardian/Partner Agreement

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 EMA shall be treated as fraud and may result in criminal and/or civil proceedings against you; and
- you have read and understood these statements.

Person 1	Person 2							
Full name (in BLOCK CAPITALS)	Full name (in BLOCK CAPITALS)							
Signature	Signature							
Today's date Day Month Year	Today's date Day Month Year							



3 things to remember



1 Get your EMA!

Make sure you've answered all the questions and sections we need you to and then return your fully completed form as soon as possible.



2 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!



3 Send the form

Return your completed form to the address below:

EMA Wales Customer Services PO Box 5596 Glasgow G52 9BR