

Applying for student finance based on household income form **2020/21**

About this form

Who should complete this form?

Complete this form if you want to change your student finance application to be based on your household income.

e Where you see this icon it means we need you to give supporting evidence. Details of the evidence needed will be shown where the icon appears.

If you leave any question blank we won't be able to process your application. If a question doesn't apply to you, enter 'None' or 'N/A' as the answer.

To find out how we'll use the information you provide go to www.studentfinancewales.co.uk/privacynotice to read our Privacy Notice before completing this form.

What sections should you complete?

All students need to complete sections **1, 2 & 4** and read, sign and date the **declaration**.

Only complete section **3** if you want to apply for a Parents' Learning Allowance, Adult Dependants' Grant and/or Childcare Grant.

Your application to have your student finance based on your household income, or an application for Parents' Learning Allowance, Adult Dependants' Grant and/or Childcare Grant **must be received within 9 months from the start of your academic year**.

1 your personal details

1.1 Customer Reference Number

1.2 Personal details

Title

Mr Mrs Miss Ms

Forename(s)

Surname

Date of birth

Day - Month - Year



2 financial questions

Your Income

2.1 What is the total taxable unearned income, before deductions, that you expect to get in the academic year 2020/21?

do include any income from:

- bank or building society gross interest (excluding ISAs)
- property, lettings or rent
- dividends or investments
- trusts or sponsorships
- other payments received for attending the course

don't include any:

- earnings from full or part time work.
- Maintenance Loan or grant payments you may receive
- payments you receive from parents under a covenant
- Teacher Training Bursaries
- Higher Education Bursaries (for care leavers)
- Bounties paid by the armed forces to reservists
- Disablement or invalidity payments

£

What is the source of this income?

Payments from your employer

2.2 Will you be employed during the academic year 2020/21?

- No – go to 2.5
 Yes

2.3 Will your employer be specifically releasing you to attend your course for the academic year 2020/21?

- No
 Yes – how much will your employer pay you for time spent attending the course during this period? £

2.4 Will you or your employer pay any money into a pension fund on your behalf during the academic year 2020/21?

- No
 Yes – how much during this period? £

Dependent Children

2.5 Will you have any children who will be wholly or mainly financially dependent on you during academic year 2020/21?

- No** – go to 2.6
 Yes

2.5.1 Give details of the dependent children

When stating the child's income, include their income from all sources after income tax and social security contributions in tax year 2018-19.

Do Include any income the child gets from:

- working
- interest earned on savings
- investments
- any maintenance payments

Don't include income from:

- Government Child Trusts
- State Child Benefit
- Child Tax Credits
- The child element of Universal Credit

e You must provide a photocopy of Birth Certificates and evidence of Child Tax Credits, the child element of either Working Tax Credit or Universal Credit and/or Child Benefits for each child named.

If you have more than two dependent children, give details for each additional child on a separate piece of paper and attach to this form.

Child 1 full name

Relationship to you

Date of birth

Day - Month - Year

Who do they live with?

Income from all sources after income tax and social security

£

Child 2 full name

Relationship to you

Date of birth

Day - Month - Year

Who do they live with?

Income from all sources after income tax and social security

£

Additional Financial Support

2.6 Do you want to apply for any of the following:

- Parents' Learning Allowance
- Adult Dependants' Grant
- Childcare Grant?

For further information on Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant, go to:

www.studentfinancewales.co.uk

- No** – go to section 4
 Yes – go to section 3

3 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

3.1 Are you a lone parent?

- No
 Yes – go to 3.4

3.2 Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance?

- No – go to 3.4
 Yes

3.3 Give the total estimated income after income tax and National Insurance deductions in the academic year 2020/21 for:

How much of this will be Child Tax Credit or the child element of Universal Credit for the academic year 2020/21?

You	Your partner
£ <input type="text"/>	£ <input type="text"/>
You	Your partner
£ <input type="text"/>	£ <input type="text"/>

3.4 Answer this question if you are applying for Childcare Grant.

During the 2020/21 academic year, do you or your spouse, civil partner or cohabiting partner receive, or expect to receive:

- the childcare element of Working Tax Credit or Universal Credit; or
- Tax-Free Childcare from HMRC; or
- Childcare Allowance from the National Health Service (NHS)?

- No
 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 these sources.

Applying for a Childcare Grant

To apply for a Childcare Grant, as well as completing this form you **must** complete a Childcare Grant Form (CCG1). You can download this form at: www.studentfinancewales.co.uk

3.5 Are you applying for Adult Dependants' Grant?

- No – go to section 4
 Yes

3.6 Who is your adult dependant?

- Your husband
Your wife
Your civil partner
Your partner (if you are 25 or over)
– go to section 4
 other adult dependant

3.7 Will your other adult dependant's income be more than £3,923 for the academic year 2020/21?

- No
 Yes

Applying for Adult Dependants' Grant

You will not be able to apply for Adult Dependants' Grant if your other adult dependant's income is more than £3,923 in the academic year 2020/21.

3.8 Give your other adult dependants' income for the 2018-19 tax year.

Income

All salary/wages and self-employed income (include 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 from interest, investments and dividends

Taxable state benefits

All other taxable income (for example, money received as compensation or from redundancy. You must include the full amount of your redundancy payment, even if you don't expect to pay tax on it.)

Deductions

Private pension contributions and Additional Voluntary Contributions (AVCs)

Allowable expenses on which tax relief was claimed

3.9 Only complete this question if you started your course before 1 August 2018.

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

Financial commitments to include would be:

- household insurance
- medical insurance
- life assurance premiums
- mortgage repayments
- repayments under a loan agreement such as a Building Society home improvement loan, or maintenance payments for a dependant.

Type

Type

Type

If you need further space use the additional notes pages at the back of this form.

4 about your family

Your parent(s) or partner may have received a separate form asking them to provide details about their income. This must also be completed and returned to us.

4.1 Are you an independent student?

To be an independent student usually you would meet one of the following criteria:

- You are 25 or over
- You have care of a child under 18
- You are married/in a civil partnership
- You have supported yourself for 3 or more years
- You are an orphan
- You have no contact with your parents, and this will not change
- It is impossible/impractical to contact your parents, or sending you money would place them in jeopardy

Yes – Go to the declaration on page 7

No

4.2 Which parent do you normally live, or have the most contact with?

The following family members count for the purposes of income assessment:

- Your natural or adoptive parents (if both of them live with you)
- Your parent and their partner (if they have one)

Your parent's partner is defined as:

- Your stepmother or stepfather
- Your parent's same or opposite sex partner if they live together as if they were married or in a civil partnership

Mother

Father

Both – go to the declaration on page 7

Neither – go to the declaration on page 7

4.3 What is the marital status of this parent?

- e** Ask your parent to send evidence of their marital status if they are separated, divorced or have had their civil partnership dissolved.

They must send a copy of their:

- Decree absolute
- Dissolution order
- A letter from their solicitor confirming their status

Single

Living with partner

Married/civil partnership

Separated **e**

Divorced/dissolved civil partnership **e**

Widowed/surviving civil partner

Now read, sign and date the declaration on the next page

declaration

- I can 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 may not receive financial support, and support I have had may be withdrawn and I could be prosecuted.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full.
- To find out how we'll use the information you provide go to www.studentfinancewales.co.uk/privacynotice to read our Privacy Notice before signing this form. Alternatively, you can request a copy by writing to the Student Loans Company Ltd (SLC) at 100 Bothwell Street, Glasgow, G2 7JD or by calling us on 0300 200 4050.

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

Day - Month - Year

next steps

Once your form is fully complete and the declaration has been signed and dated, you should return it to:

Student Finance Wales
PO Box 211
Llandudno Junction
LL30 9FU

Make sure you pay the correct postage



additional notes

If you're providing extra information clearly mark what section and question the information is about.