

## Current Year Income Assessment Form - Academic Year 2010/11

### Personal details

### Why should I complete this form?

You should complete this form if you think your total household income (before tax) for tax year 2010-11 will be at least 5% less than it was in tax year 2008-09.

### How do I complete this form?

You need to complete all 3 sections of this form by providing details about your expected income for the tax year 2010-11. Don't forget to sign the Declaration at the end.

- Section A - Tax Credits and Income Support
- Section B - your financial information
- Section C - obligations

Notes to help you complete some of the questions within the form can be found every time you see this icon.



### After I have sent you my completed form, do I need to do anything else?

Yes, but not just now. After tax year 2010-11 has ended, we will contact you and ask you to confirm, with evidence, your actual earnings for that tax year.

These evidence items will be the same documents that you send to, or receive from, HM Revenue & Customs. For example, a P60, SA200 or Self Assessed Tax Return.

If your actual income is different from your estimates we may adjust the amount of student finance awarded. If we have paid the student(s) too much we may have to recover student finance from them.

# Tax Credits and Income Support

# A

**Q1** Does your tax year end on 5 April 2011?

Yes  No

If no, when does it end?

DAY MONTH YEAR



If your tax year ends on a date other than 5 April 2011, please provide us with information for your tax year that will end during the academic year 2010/11.

**Q2** Will or do you expect to receive Working Tax Credits or Child Tax Credits?

Yes  No

**Q3** Will you receive Income Support?

Yes  No

section

# B your financial information

**How to answer the questions in this section:**

- If you answer 'Yes' to any of these questions you will need to provide the **total** amount of income you expect to receive for that income type.
- The total amount should include all earnings for the full tax year. For example, if you were made redundant part-way through the year, you need to include earnings from 6 April 2010 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2011.
- For pension payment questions, please tell us the amount of the pension you expect to receive from the first month you receive it until the end of the tax year.
- **If you answer 'No'** to any question, you are telling us that you do not expect to receive any income from that particular income type.

**Q1** Do you expect to receive any income from salary, wages, occupational pensions or taxable state benefits?

Yes  No

Total income expected:

£



If you are in receipt of taxable state benefits, only include the following benefits in your total above:

- |   |   |                              |
|---|---|------------------------------|
| • Bereavement Allowance                               | • Incapacity Benefit. Only include the amount received after 28 weeks of incapacity | • Statutory Maternity Pay    |
| • Carer's Allowance                                   | • Industrial Death Benefit  | • Statutory Paternity Pay    |
| • Contribution based Employment and Support Allowance | • Jobseekers Allowance  | • Statutory Sick Pay         |
| • Graduated retirement benefit                        | • Statutory Adoption Pay  | • Widowed Parent's Allowance |

# your financial information - continued

**Q2** Do you expect to receive any income from self-employment?  Yes  No

Total expected income from self employment: £

**Q3** Do you expect to receive any income from a State Retirement Pension?  Yes  No

Total expected non-lump sum amount: £

Total expected lump sum amount: £

**Q4** Do you expect to receive any income from employment as a Minister of Religion?  Yes  No


Total expected income amount (minus any expenses that would not normally show on a P60 or P11D): £

**Q5** Do you expect to receive any income from savings and investments?  Yes  No

Total expected income from savings and investments: £


**Q6** Do you expect to receive any income from taxable benefits in kind?  Yes  No

Total expected income from taxable benefits in kind: £

 Taxable benefits in kind are other benefits that you are entitled to, but do not form part of your salary. For example, a fuel allowance or company car.

**Q7** Do you expect to receive any income from lump sums or from other taxable income sources?  Yes  No

Total expected income from lump sums or other taxable income sources: £

 For example, money received as compensation or from redundancy.


**Q8** Do you expect to receive any income from property lettings?  Yes  No

Total expected income from property lettings: £

# B your financial information - continued


**Q9** Do you expect to receive any income from UK Trusts?  Yes  No

Total expected income from UK Trusts: £

 For example, payments from settlor-interested Trusts and income from UK estates.

**Q10** Do you expect to receive any foreign income?  Yes  No

Total expected foreign income: £

 For example, benefits from overseas trusts and companies, or gains from foreign life policies.

**Q11** Do you expect to receive any income from an overseas pension?  Yes  No

Total expected income from an overseas pension: £

**Q12** Do you expect to receive any other overseas income and gains?  Yes  No

Total expected other overseas income and gains: £

# obligations C

**Q1** Do you expect to pay any private pension contributions?  Yes  No

Total expected private pension contributions: £

**Q2** Do you expect to pay any Additional Voluntary Contributions (AVCs)?  Yes  No

Total expected AVCs: £

**Q3** Do you expect to have any allowable expenses on which you will claim tax relief?  Yes  No

Total expected allowable expenses on which you will claim tax relief: £

# Declaration

Our Data Protection Statement sets out who will use the information provided on this form and what they will use it for. Before signing this form please read our statement online at [www.studentfinancenl.co.uk/dataprotection](http://www.studentfinancenl.co.uk/dataprotection). Alternatively, you can request a copy by writing to the Student Loans Company (SLC) at 100 Bothwell Street, Glasgow, G2 7JD or by calling 0845 600 0662.

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

**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.
- I agree to supply any further information in relation to the applicant's application for financial support that the Education and Library Board (ELB) may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.

Your name (in BLOCK CAPITALS):

Signature:

Relationship to student:

Date:

DAY	MONTH	YEAR
<input type="text"/>	<input type="text"/>	<input type="text"/>