

# PFF2



## Assessment of financial circumstances - Academic Year 2010/11

You can also provide your financial details online at  
[www.studentfinanceneni.co.uk](http://www.studentfinanceneni.co.uk)

# Important Information

This form asks for information about your income. We need this information to help us determine a student's entitlement to student finance.

Please provide details of your income on this form if you are:

- The student's natural or adoptive parent;
- The student's step-parent;
- The husband, wife, civil partner or cohabiting partner of one of the student's parents;
- The student's husband, wife or civil partner; or
- The student's cohabiting partner, if the student is over 25 and entered higher education in 2000/01 or later.


# Instructions

- You need to provide details in all 3 sections of this form:

**section 1** - personal details

**section 2** - your financial information for tax year 2008-09

**section 3** - your dependants

- Please refer to the Support Notes at the back of this form each time you see this icon. 
- **If you have any questions or problems you can:**
  - visit our website at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)
  - contact our Customer Support Office on **0845 600 0662**.
- **Once you have completed this form** and signed and dated the declaration, please return it to us as soon as possible. You can find our address on the Library Board finder available online at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)



**Please remember to pay the correct postage.**

personal details

**Student's details**

a

Customer Reference Number:

Forename(s):  Surname:

Date of birth:

**Your details** (Please complete this section with the details exactly as they appear on your birth certificate or passport.)

b

Forename(s):  Surname:

Sex: Male  Female  Date of birth:

Place of birth (name of the town or village):


If you have your own Customer Reference Number please write it here:

Relationship to student:

Contact telephone number:

Email address:


your financial information  
for tax year 2008-09

Please give financial details for the tax year from 6 April 2008 to 5 April 2009.   
Answer 'Yes' or 'No' to all 17 questions in this section, providing income details where applicable. Please note that if you leave any questions blank we will not be able to process this application.


- Q1** Did you receive Working Tax Credits or Child Tax Credits?  Yes  No
- Q2** Did you receive Income Support?  Yes  No

**How to answer questions 3 - 14**


- If you answer 'Yes' to any of these questions you will need to provide the **total** amount of income you received for that income type.

If you need help to calculate the total income you should refer to the guidance notes. 

- If you answer 'No' to a question, this means you are telling us that you did not receive any income from that particular income type.


**Q3**  Did you receive any income from salary, wages, occupational pensions or taxable state benefits?  Yes  No

Total income received:

**Q4**  Did you receive any income from Self-employment?  Yes  No


Combined total income showing on your SA103 and SA200 forms:

Total income showing on your SA104 form:


**Q5**  Did you receive any income from a State Retirement Pension?  Yes  No

Total non-lump sum amount received:

Total lump sum amount received:

**Q6**  Were you a Minister of religion?  Yes  No

Total income (minus expenses not included on your P60 or P11D):


**Q7**  Did you receive any income from savings and investments?  Yes  No

Combined total income showing on your SA100 and SA200 forms or on your bank statements/letters if you were not Self-Assessed:

Total income showing on your SA101 form:

Total income showing on your SA104 form:

Total income showing on your SA106 form:

**Q8**  Did you receive any taxable benefits in kind?  Yes  No

Total income from taxable benefits in kind:

your financial information  
for tax year 2008-09

**Q9**



Did you receive any other taxable income or lump sums?

Yes  No

Total other taxable income or lump sums:

£

**Q10**



Did you receive any income from property lettings?

Yes  No

Total income from property lettings:

£

**Q11**



Did you receive any income from UK trusts?

Yes  No

Total income from UK trusts:

£

**Q12**



Did you receive any foreign income?

Yes  No

Total foreign income:

£

**Q13**



Did you receive any income from an Overseas Pension?

Yes  No

Total income from an Overseas Pension:

£

**Q14**



Did you receive any other overseas income and gains?

Yes  No

Total income from other overseas income and gains:

£

**Obligations**

**Q15**



Did you pay any private pension contributions?

Yes  No

Total private pension contributions you paid:

£

**Q16**



Did you pay any Additional Voluntary Contributions (AVCs)?

Yes  No

Total Additional Voluntary Contributions you paid:

£

**Q17**



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

Yes  No

Total allowable expenses on which you claimed tax relief:

£

section

# 3

## your dependants

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

**a**

### Child dependants not in further or higher education in academic year 2010/11

Include unearned income for ALL dependants.

Only include earned income details for persons aged 16 and over.

Do not count casual earnings of persons aged under 16.

Full name

Date of birth

Income for the year (£)

DAY MONTH YEAR

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**b**

### Child dependants in further or higher education in academic year 2010/11

Do **not** include the student when completing this question.

If the student is your partner, please include any children they named in their Application for Student Finance if the children have applied for student finance.

Full name

Date of birth  
DAY MONTH YEAR

School, college  
or university

Course

Are they receiving  
financial support?  
If so, from which  
authority or  
organisation?

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# Data Protection Act 1998

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998.

We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these. The Department for Employment and Learning is a joint Data Controller for your information.

If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering.

We may share the information you have given us with other organisations including the Department for Employment and Learning, other Government bodies and with the university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do.

For more detailed information about with whom we share your information and for what purpose, go to [www.studentfinancenl.co.uk/dataprotection](http://www.studentfinancenl.co.uk/dataprotection).

## Declaration

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 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 decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.**

If the applicant started their course in academic year 2006/07 or after they 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.

If you **do not** wish your details to be shared for this purpose, please tick this box.

Your full name

(in BLOCK CAPITALS):

Your signature:

Date:

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

# Support Notes

## section 2 - your tax information for tax year 2008-09

Please give information for the tax year 2008-09. Normally, this is the year ending 5 April 2009, but may differ if your employer or business has a tax year which does not end in April. For any income paid in a foreign currency, please state the equivalent in pounds sterling.

### What if my income is less in tax year 2010-11 than it was in tax year 2008-09?

If you think the total income for your household (before tax) for the tax year 2010-11 will be at least 5% less than it was in tax year 2008-09, still complete this section.

From April 2010, it may be possible for the financial assessment to be calculated using the expected total income for your household in the tax year 2010-11 - a 'current year income assessment'.

- If you are completing this form before April 2010, please give brief details of the expected reduction in income on a separate piece of paper and enclose it with this application. We will then contact you for further information when we can fully assess your household's financial circumstances.
- If you are completing this form after April 2010, you can download a 'Current Year Income Assessment' form from [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk) and return it with this application or contact our Customer Support Office on 0845 600 0662 to have one sent to you.
- All family members who count for the purposes of income assessment will need to complete a 'Current Year Income Assessment' form so we can fully assess your household's financial circumstances.



Please note that a 'current year income assessment' cannot be carried out unless you also provide your financial details for the 2008-09 tax year.

### Q3. Income from salary, wages, occupational pensions or taxable state benefits

#### Benefits

Only include income received for the following benefits:

- Bereavement Allowance
- 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
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

## section 2 - your financial information for tax year 2008-09

### Income from salary, wages, occupational pensions or taxable state benefits

Income Type Name	Amount (£)	Where to find amount
Total salary or wages for the year:	£ <input type="text"/>	P60 - Pay and income details box
Income from taxable state benefits:	£ <input type="text"/>	P60 - Pay and income details box
Occupational Pension:	£ <input type="text"/>	P60 - Pay and income details box
Tips and other payments not on P60:	£ <input type="text"/>	SA102 E1 Box 3
Directors salary or wages:	£ <input type="text"/>	P60 - Pay and income details box
<b>Total income received:</b>	£ <input type="text"/>	Write this total figure on the application form.

### Q4. Income from Self-employment

Income showing on your SA103 and/or SA200 documents:

Income Type Name	Amount (£)	Where to find amount
Total taxable profits from this business (aggregated for multiple Self-employments):	£ <input type="text"/>	SA103F Box 72 + Box 74 SA103L Box 51 minus Box 52, SA103S Box 27 + Box 29
Profit (Self-employment):	£ <input type="text"/>	SA200 Box 3.10
Business start up allowance:	£ <input type="text"/>	SA200 Box 3.6
<b>Total Self-employment income from SA103 and SA200:</b>	£ <input type="text"/>	Write this total figure on the application form.

Income stated on SA104 document

Income Type Name	Amount (£)	Where to find amount
Share of total taxed and untaxed income other than that taxable at 10% and 20%:	£ <input type="text"/>	SA104F Box 14 + Box 17 + Box 66 + Box 73 minus Box 74
Your share of total taxable profit from partnerships:	£ <input type="text"/>	SA104S Box 14 + 17
<b>Total Self-employment income showing on your SA104 document:</b>	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Q5. Income from a State Retirement Pension

Non-lump sum

Income Type Name	Amount (£)	Where to find amount
State Retirement Pension (non-lump sum):	£ <input type="text"/> Write this figure on the application form.	SA100 TR3 Box 7 or SA200 Box 4.1

Lump sum

Income Type Name	Amount (£)	Where to find amount
State Retirement Pension (lump sum):	£ <input type="text"/> Write this figure on the application form.	SA100 Box 8

### Q6. Minister of religion

Income Type Name	Amount (£)	Where to find amount
Total taxable income minus expenses not included in your P60 or P11D:	£ <input type="text"/> Write this figure on the application form.	SA102M Box 4 + Box 8 + Box 10 minus (Box 26 + Box 35)

### Q7. Income from savings and investments

Total income showing on your on SA100 and SA200 documents or on your bank statements/letters if you were not Self-assessed (SA).

Income Type Name	Amount (£)	Where to find amount
Dividends from UK companies:	£ <input type="text"/>	SA100 TR3 Box 3 (grossed up)
Dividends from unit trusts and open ended investment companies:	£ <input type="text"/>	SA100 TR3 Box 4 (grossed up)
Foreign dividends (up to £300):	£ <input type="text"/>	SA100 TR3 Box 5
UK bank, building society, unit trust etc. interest/amount which has been taxed already (grossed up) + untaxed UK interest (amounts that have not been taxed at all):	£ <input type="text"/>	SA100 TR3 Box 1 (grossed up) + SA100 TR3 Box 2 or SA200 Box 5.1 (grossed) + SA200 Box 5.2
UK interest, dividends and other investment income – company dividends (excluding tax credit):	£ <input type="text"/>	SA200 Box 5.3
Total savings and investment income showing on your SA100 and SA200 documents:	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Income from savings and investments

Income Type Name	Amount (£)	Where to find amount
Stock dividends:	£ <input type="text"/>	SA101 Ai1 Box 12 (grossed up)
Non-qualifying distributions and close company loans written off or released:	£ <input type="text"/>	SA101 Ai1 Box 13
Interest from gilt edged and other UK securities – gross amount before tax:	£ <input type="text"/>	SA101 Ai1 Box 3
UK life insurance policy etc. gains on where no tax was treated as paid:	£ <input type="text"/>	SA101 Ai1 Box 6
UK life insurance policy etc. gains from voided ISAs:	£ <input type="text"/>	SA101 Ai2 Box 8
Life insurance gains - UK life insurance policy etc. gains on which tax was treated as paid:	£ <input type="text"/>	SA101 Ai1 Box 4
Share schemes - taxable amount:	£ <input type="text"/>	SA101 Ai2 Box 1
Total savings and investment income showing on your SA101 document:	£ <input type="text"/>	Write this total figure on the application form.

### Total income showing on your SA104 document

Income Type Name	Amount (£)	Where to find amount
Total untaxed savings income taxable at 20%:	£ <input type="text"/>	SA104F Box 33
Taxed income taxable at 10%:	£ <input type="text"/>	SA104F Box 69
Taxed income taxable at 20%:	£ <input type="text"/>	SA104F Box 72
Taxed interest:	£ <input type="text"/>	SA104S Box 26
Total savings and investment income showing on your SA104 document:	£ <input type="text"/>	Write this total figure on the application form.

### Total income showing on your SA106 document

Income Type Name	Amount (£)	Where to find amount
Foreign investment income:	£ <input type="text"/>	SA106 F3 Box 4
Dividend income (foreign) other:	£ <input type="text"/>	SA106 F3 Box 11
Dividends from foreign companies:	£ <input type="text"/>	SA106 F3 Box 6 (grossed up)
Total savings and investment income showing on your SA106 document:	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Q8. Income from taxable benefits in kind

Income Type Name	Amount (£)	Where to find amount
Total cash equivalent of fuel for all cars/vans made available:	£ <input type="text"/>	P11D Box 10 (Section F & G)
Private medical treatment or insurance:	£ <input type="text"/>	P11D Box 11
Vouchers and credit cards:	£ <input type="text"/>	P11D Box 12 (Section C)
Mileage allowance and passenger payments:	£ <input type="text"/>	P11D Box 12 (Section E)
Assets transferred or placed at employees disposal (cars, property, goods or other assets):	£ <input type="text"/>	P11D Box 13 (Section A)
Assets placed at employees disposal:	£ <input type="text"/>	P11D Box 13 (Section L)
Living accommodation:	£ <input type="text"/>	P11D Box 14 (Section D)
Payments made on behalf of employee:	£ <input type="text"/>	P11D Box 15 (Section B)
Cash equivalent of loans after deducting any interest paid by the borrower:	£ <input type="text"/>	P11D Box 15 (Section H)
Qualifying relocation expenses payments and benefits:	£ <input type="text"/>	P11D Box 15 (Section J)
Services supplied:	£ <input type="text"/>	P11D Box 15 (Section K)
Other items (including subscriptions and professional fees):	£ <input type="text"/>	P11D Box 15 (Section M)
Expenses payments made to, or on behalf of, the employee:	£ <input type="text"/>	P11D Box 16 (Section N)
Total cash equivalent of all cars/vans made available:	£ <input type="text"/>	P11D Box 9 (Section F & G)
<b>Total income from taxable benefits in kind:</b>	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Q9. Income from other taxable income and lump sums

Income Type Name	Amount (£)	Where to find amount
Other taxable income before expenses and tax taken off (casual earnings, freelance income, business receipts where your business has ceased):	£ <input type="text"/>	SA101 TR3 Box 15
Foreign earnings not taxable in the UK:	£ <input type="text"/>	SA101 Ai2 Box 12
Taxable lump sums, excluding redundancy and compensation for loss of job:	£ <input type="text"/>	SA101 Ai2 Box 3
Lump sums or benefits received from an employer financed retirements benefit scheme:	£ <input type="text"/>	SA101 Ai2 Box 4
Redundancy and other lump sums and compensation payments:	£ <input type="text"/>	SA101 Ai2 Box 5
Other income (short return):	£ <input type="text"/>	SA200 Box 7.1
<b>Total income from other taxable income and lump sums:</b>	£ <input type="text"/>	Write this total figure on the application form.

### Q10. Income from property lettings

Income Type Name	Amount (£)	Where to find amount
Income from foreign property or land:	£ <input type="text"/>	SA106 Box 25
Income from UK property:	£ <input type="text"/>	SA200 Box 6.3 or SA105 Box 36
<b>Total income from property lettings:</b>	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Q11. Income from UK trusts

Income Type Name	Amount (£)	Where to find amount
Discretionary income payment from a trust (grossed up):	£ <input type="text"/>	SA107 Box 1 (grossed up)
Total payments from settlor-interested trusts:	£ <input type="text"/>	SA107 Box 2
Foreign estate income:	£ <input type="text"/>	SA107 Box 22
Non-discretionary income entitlement from a trust - net amount taxed at basic rate (grossed up):	£ <input type="text"/>	SA107 Box 3 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at savings rate (grossed up):	£ <input type="text"/>	SA107 Box 4 (grossed up)
Non-discretionary income entitlement from a trust - net amount taxed at dividend rate (grossed up):	£ <input type="text"/>	SA107 Box 5 (grossed up)
Income chargeable on settlors:	£ <input type="text"/>	SA107 Boxes 13 - 14
Income from UK estates grossed up:	£ <input type="text"/>	SA107 Boxes 16 - 21 (grossed up)
Income chargeable on settlors:	£ <input type="text"/>	SA107 Boxes 7 - 12 (grossed up)
<b>Total income from UK trusts:</b>	£ <input type="text"/>	Write this total figure on the application form.

## section 2 - your financial information for tax year 2008-09

### Q12. Foreign income

Income Type Name	Amount (£)	Where to find amount
All other overseas income received by an overseas trust, company or other person abroad:	£ <input type="text"/>	SA106 F3 Box 13
Overseas pensions etc:	£ <input type="text"/>	SA106 F3 Box 9
Gains on disposals of holdings offshore funds and discretionary income from non resident trusts:	£ <input type="text"/>	SA106 F6 Box 41
Benefit received from an overseas trust, company or other person:	£ <input type="text"/>	SA106 F6 Box 42
Gains on foreign life policies (amount of gain):	£ <input type="text"/>	SA106 F6 Box 43
Total foreign income:	£ <input type="text"/>	Write this total figure on the application form.

### Q13. Income from an Overseas Pension

Income Type Name	Amount (£)	Where to find amount
Total amount of unauthorised payment from a pension scheme, subject to surcharge:	£ <input type="text"/>	SA101 Ai4 Box 10
Taxable short service refund of contribution (overseas pension schemes only):	£ <input type="text"/>	SA101 Ai4 Box 12
Taxable lump sum death benefit payment (overseas pensions only):	£ <input type="text"/>	SA101 Ai4 Box 13
Value of pension benefits in excess of your available lifetime allowance, taken by you as a lump sum:	£ <input type="text"/>	SA101 Ai4 Box 5
Amount of unauthorised payment from a pension scheme, not subject to surcharge:	£ <input type="text"/>	SA101 Ai4 Box 9
Total income from an Overseas Pension:	£ <input type="text"/>	Write this total figure on the application form.

### Q14. Other overseas income and gains

Income Type Name	Amount (£)	Where to find amount
Amount of omissions (exemptions under transfer of foreign assets):	£ <input type="text"/>	SA106 F6 Box 46

## section 2 - your financial information for tax year 2008-09

### Obligations

#### Q15. Private pension contributions

Do not include any regular payments you are making towards a retirement pension provided by your employer.

Obligation Type	Amount (£)	
Private pension contributions:	£ <input type="text"/>	Write this total figure on the application form.

#### Q16. Additional Voluntary Contributions (AVCs)

Obligation Type	Amount (£)	
Additional Voluntary Contributions (AVCs)	£ <input type="text"/>	Write this total figure on the application form.

#### Q17. Allowable expenses on which you claimed tax relief

Obligation Type	Amount (£)	Where to find amount
Total amount of allowable expenses:	£ <input type="text"/>	SA100 TR3 Box 16
Seafarers earnings deduction:	£ <input type="text"/>	SA101 Ai2 Box 11 (Deductions)
Foreign tax for which tax credit relief not claimed:	£ <input type="text"/>	SA101 Ai2 Box 13 (Deductions)
Business travel and subsistence expenses:	£ <input type="text"/>	SA102 E1 Box 17
Fixed deductions for expenses:	£ <input type="text"/>	SA102 E1 Box 18
Professional fees and subscriptions:	£ <input type="text"/>	SA102 E1 Box 19
Other expenses and capital allowances:	£ <input type="text"/>	SA102 E1 Box 20
Allowable expenses:	£ <input type="text"/>	SA200 Box 2.5
Total amount of allowable expenses:	£ <input type="text"/>	Write this total figure on the application form.

## section 3 - your dependants

### Academic Year

You should provide the child dependants' income for the academic year. The academic year is determined by when the student begins their study.

<b>Student's study begins between:</b>	<b>Academic Year</b>
1 August 2010 and 31 December 2010 inclusive	1 September 2010 to 31 August 2011
1 January 2011 and 31 March 2011 inclusive	1 January 2011 to 31 December 2011
1 April 2011 and 30 June 2011 inclusive	1 April 2011 to 31 March 2012
1 July 2011 and 31 July 2011 inclusive	1 July 2011 to 30 June 2012

- a** The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student, the student's husband, wife or partner or the student's parents or step-parents. You can find out more information about how household information is calculated in the booklet 'A guide to financial support for higher education students 2010/11'.

Please do not include income from sources such as the Government Child Trust, State Child Benefit or minimal sums of money from other sources when entering a child dependant's income.

### Declaration

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

### Change of circumstances

You must notify the ELB about any change in your circumstances, which may affect the applicant's entitlement to financial support. The most common change of circumstances would be if:

- your household income changes; or
- your marital status changes.

### Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - "bursary administration purposes") they may ask the Department for Employment and Learning, your Education and Library board or the Student Loans Company for access to information you provide in connection with any application for student finance in academic year 10/11 (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you **do not** give consent for us to share this information, the payment of any bursary or scholarship to which the student(s) you are supporting may be entitled will be delayed.