



PR1

Application for Student Finance for continuing students 2011/12

You can also apply online at www.studentfinancenl.co.uk

Your forename(s)

Your surname

You should complete this form if you are continuing study on one of the following courses:

- A full-time or sandwich course of higher education
- A full-time Initial Teacher Training (ITT) course
- A part-time ITT course
- A flexible ITT course that lasts at least six weeks
- A diploma or degree course in a health related discipline and you are eligible to apply for an **income assessed** bursary from the National Health Service (NHS) or the Department of Health, Social Services and Public Safety (DHSS&PS)
- A full-time or sandwich course of higher education at the College of Agriculture, Food and Rural Enterprise (CAFRE) that was previously funded by the Department of Agriculture and Rural Development (DARD)

This form should be completed in conjunction with the PR1 notes. The notes will give you extra information to help you complete the form correctly so that there are no delays with processing your application due to incorrect answers, missing information or lack of evidence.

Deadline

It is very important we receive this form with all the appropriate evidence by **30 June 2011**. This means you can be confident you will receive your first payment at the start of term.

Please remember if the deadline passes we will do our best to process your application as soon as possible, however your first payment may not be available at the start of term.


This form should be returned within 9 months of the start of your academic year, otherwise you may lose your full entitlement to student finance.

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finance available

All students can apply for the following student finance by completing this form: 

- Maintenance Loan
- Tuition Fee Loan
- Parents' Learning Allowance
- Adult Dependants' Grant
- Travel Grant
- Disabled Students' Allowances
- Childcare Grant

If you started your course in academic year 2006/07 or after (not including gap year students who started in 2006/07) you can also apply for: 

- Maintenance Grant
- Special Support Grant
- Bursaries and Scholarships


If you started your course in academic year 2005/06 or before (this would include gap year students who started in 2006/07) you can also apply for: 


- Grant for Tuition Fees
- Higher Education Bursary

You can find more detailed information on what is available and what you might be entitled to in 'A guide to financial support for higher education students 2011/12' or by using our Student Finance Calculator. Both are available from www.studentfinancenl.co.uk.

You can apply in 5 easy steps

(Depending on your circumstances you may not need to complete all of the steps).

We have provided guidance notes to help with any difficult questions so please refer to these each time you see this icon. 

You will have to send evidence with your application whenever you see this icon.  Details about the evidence can be found in the guidance notes.

Step 1

For all students



- Complete sections 2-4.
- Don't forget if you are applying for a loan you need to tell us how much you want by completing the Loan Request section on page 9.
- You do **not** need to complete section 4 if you are **only** applying for a Tuition Fee Loan.



If you **only** want to apply for a Tuition Fee Loan or a reduced rate of Maintenance Loan you can go to **Step 5**.

Step 2

For students who want student finance based on household income

- Complete sections 5 and 6.
- If you think you qualify for the Special Support Grant, please tick this box. Tick Detailed information about who can qualify for the Special Support Grant and what evidence needs to be provided can be found in the notes.  

Step 3

For students who have dependants

- Complete section 7.
- You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.



If you are a single independent student go to **Step 5**.

**Step
4**

For students who want student finance based on household income

- Complete section 8.
- Depending on your answers in section 8 you may need to ask your **parent(s) or partner** to provide details about their income in section 9 so we can work out what your full entitlement to student finance will be.

**Step
5**

For all students

- Make sure that you read and sign the **Student Declaration on pages 15/16**. If you asked someone to complete section 9, make sure that they have signed **their declaration(s) on page 25**.

Other student finance available

Childcare Grant 

If you want to apply for the Childcare Grant you need to complete this form then complete a Childcare Grant application form.

Please send me a Childcare Grant application form: Tick

Disabled Students' Allowances (DSAs) 

If you want to apply for DSAs you need to complete this form then complete a Disabled Students' Allowances application form.

Please send me a DSA form: Tick

Childcare Grant and DSA application forms can also be downloaded from www.studentfinancenl.co.uk or requested by calling us on **0845 600 0662**.

What if I have further questions?

If you have further questions you can:

- visit www.studentfinancenl.co.uk
- refer to 'A guide to financial support for higher education students 2011/12'
- call us on **0845 600 0662**

Where do I send my form?

You must return your completed form to the Education and Library Board (ELB) address which can be found in section 9 of the booklet 'A guide to financial support for higher education students in 2011/12' or on the Education and Library Board finder available online at www.studentfinancenl.co.uk.



Please remember to pay the correct postage.

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personal details

Customer Reference Number (if you have one)

Personal details

a Title Mr Mrs Miss Ms


Forename(s)

Surname

Sex Male Female

Date of birth DAY MONTH YEAR

Contact details

b Please give your current home address. If you know it, please also give your term-time correspondence address. 

Home address

Postcode

Home phone number

Term-time address

Postcode

Date on which you will move to this address

DAY MONTH YEAR


Mobile phone number

Email address

Marital status

c Please tick one box:

Single

Living with a partner 

Married/civil partnership 

Please give the date of marriage/civil partnership

Separated 

Divorced/dissolved civil partnership 

Widowed/surviving civil partner 

 DAY MONTH YEAR

about your course and your university or college

- a** Full tuition fee amount for the academic year 2011/12. £
- Please remember your tuition fee amount can change each academic year. If you are unsure about the tuition fee amount you will be charged, please contact your university or college for clarification.
- b** Is this the final year of your course? Yes No
- c** Will you be studying at exactly the same university or college and on exactly the same course that you were in the academic year 2010/11? Yes No **if 'Yes' go to e**

If any of your course or university and college details have changed in any way since you applied for student finance for the previous academic year, you must complete all of the questions in this section with the new details.

University/college details

- d** University/college name and address

Postcode

UCAS personal identification number

UCAS university/college code

UCAS campus code (if applicable)

Course details

- e** Course name
- If you are following a combined studies or modular course, please list all subjects being studied
-
-
-
- UCAS course code
- Qualification you expect to gain (e.g. BSc Physics)
- Course start date
- Course end date
- Course length (years)

about your course and your university or college

Year of course

Foundation

Third year

First year

Fourth year

Second year

Other (give details)

If the course is franchised to another university/college, give the address of the other university/college

Postcode

f **Course type (please tick one box):**

Full time undergraduate

Initial Teacher Training (ITT) courses

Flexible postgraduate ITT

Part-time undergraduate ITT

Part-time ITT ⁿ
(excluding first degrees)

Full-time postgraduate ITT

Other course types

Full-time distance learning

Full-time foundation degree

Full-time involving a placement (sandwich course)

Answer both questions

Number of weeks you will be studying full-time in academic year 2011/12.

Number of weeks you will be on full-time teaching practice in academic year 2011/12.

Do you have a disability which prevents you from attending your university/college in person? ^e

Yes No

g Have you been awarded a state-funded place on a dance and drama course at a privately-funded institution? ^e

Yes No

h Are you eligible to apply for any bursary or award, excluding a social work bursary, for the academic year 2011/12 from any of the following:

- National Health Service (NHS)
- Department of Health, Social Services and Public Safety (DHSS&PS)
- Scottish Government Health Directorate Bursary (Scottish Healthcare Allowance)? ⁿ

Yes No

If 'Yes', is this bursary or award income assessed or non-income assessed?

Income assessed

Non-income assessed




about your course and your university or college

Term details

i Where will you live during the academic year 2011/12?

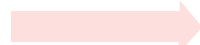
Term 1	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>
Term 2	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>
Term 3	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>

j Where will you spend most of your time studying in the academic year 2011/12?

Term 1	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/> 	Placement in the UK or abroad <input type="checkbox"/>
Term 2	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/> 	Placement in the UK or abroad <input type="checkbox"/>
Term 3	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/> 	Placement in the UK or abroad <input type="checkbox"/>

if you have ticked 'University or college' and/or 'Study abroad' for all 3 terms go to Section 4

k Where will your placement be?

Abroad <input type="checkbox"/>		If your placement is abroad, have you been accepted onto the ERASMUS exchange scheme? Yes <input type="checkbox"/> No <input type="checkbox"/>
UK/ROI <input type="checkbox"/>		
Don't know <input type="checkbox"/>		

Placement name and address, if known


<input type="text"/>	
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>

Is the placement:

paid

unpaid

If you ticked 'unpaid', please tick which type:

- a hospital, Public Health Service Laboratory or with a Primary Care Trust;
- a Health Authority, Strategic Health Authority, Local Health Board, Special Health Authority, Health Board, Special Health Board or a Health and Social Services Board;
- a Local Authority carrying out its duties relating to health, welfare or caring for children and young people, a voluntary organisation providing facilities or carrying out similar activities;
- the prison or probation sector or after-care services;
- unpaid research in a UK/ROI or overseas institution; or
- an unpaid placement that is not listed above. 

4

your UK bank or building society account details

UK bank/building society account details

This account must be in your own name and be able to accept direct credits.

Please note that missing or incorrect bank or building society details will result in your Maintenance Loan, Bursary (if applicable) or any grant payments being delayed.



Sort code

 - -

Account number

Building society roll number (if applicable)

loan request section

If you are applying for a Maintenance Loan, a Tuition Fee Loan or both, please complete this section to tell us how much you want to apply for.

National Insurance Number  - -

Maintenance Loan

Amount of Maintenance Loan you would like to apply for:

Maximum available to you

Tick

If you wish to apply for less than the maximum available to you, please state the amount.

£

Tuition Fee Loan

You can apply for up to a maximum of £3,375 depending on your circumstances. You should find out how much your university or college is charging before you apply for a Tuition Fee Loan.

Amount of Tuition Fee Loan you would like to apply for:

Maximum available to you

Tick

If you wish to apply for less than the maximum available to you, please state the amount.

£

Contact details

Please give the names and addresses of two contacts. The contacts you give **should live at different addresses** and will only be contacted if, for example, you move address and do not inform us. You **must** inform your contacts that you are providing us with their details.

Contact 1

Contact 2

Forename(s)

Forename(s)

Surname

Surname

Relationship to you

Relationship to you

Address

Address

Postcode

Postcode

Country

Country

Phone number

Phone number

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dependent and independent students

This section determines whether you are a dependent or an independent student. This is important as it establishes whose income we need to take into account from your household before we calculate your entitlement.

- a1** Will you be 25 or over on the first day of the academic year? Yes No
- if 'Yes', you are an independent student, go to Section 6
- a2** Have you been married or in a civil partnership at any time before the first day of the academic year? Yes No
- if 'Yes', you are an independent student, go to Section 6
- a3** Will you have the care of a person under the age of 18 on the first day of academic year 2011/12? n e Yes No
- if 'Yes', you may be considered an independent student, go to Section 6

If you have previously been considered independent because you have supported yourself financially for a total of 3 years or more prior to the start of the first academic year of your course, you will continue to be considered independent.

if this applies to you go to Section 6

- b** Please tick the relevant box if any of the following apply to you.
- Your parents cannot be found or it is not reasonably practicable to get in touch with them.
- You are irreconcilably estranged from (have no contact with) your parents and this will not change. n
- At any point from the age of 16 to the start of your course, you have not been under the legal care of your parents; and, for three months or more, you have been in the custody or legal care of, or have been given accommodation by, a local authority. n
- Both your parents have died.
- Your parents are living outside the European Union and the assessment of their financial circumstances would place them in jeopardy.
- Your parents are living outside the European Union and it would not be reasonably practicable or possible for them to send you money.

If you have ticked any of the boxes above, you will be contacted for evidence and, subject to this, you may be considered independent.

if you have ticked any of the boxes above go to Section 6

student financial questions

If you leave any questions blank we will not be able to process your application. If a question does not apply to you, please enter 'None' or 'N/A' as the answer.

Unearned income

a Taxable **unearned** income is any income you receive from the following sources:

- Bank or building society gross interest
- Property, lettings or rent
- Dividends or investments
- Trusts or sponsorships
- Any other payment received for attending the course

Please estimate the total taxable unearned income, before deductions, that you expect to receive in academic year 2011/12. £

What is the source of this income?

Payments from an employer

b Will your employer be releasing you to attend your course for the academic year 2011/12?

Yes No if 'No' go to d

If 'Yes', how much will your employer pay you for time spent attending your course during this period? £

c During the academic year 2011/12, will you or your employer pay any money into a pension fund on your behalf?

Yes No

If 'Yes', how much during this period? £

Dependent children

d Give details of any children who will be wholly or mainly financially dependent on you during the academic year 2011/12.

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

Child's full name	Date of birth <input type="text" value="e"/> (DD MM YYYY)	Relationship to you	Whom will they live with?	Child's income <input type="text" value="n"/> (£)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Only complete this section if you are applying for Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant.

a Are you a lone parent? Yes No **if 'Yes' go to d**

b Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance? Yes No **if 'No' go to d**

c What is the total estimated income after income tax and National Insurance deductions likely to be over the student's academic year 2011/12 for:

You	£	Your partner	£
-----	---	--------------	---

How much of this will be Child Tax Credit for the academic year 2011/12?

You	£	Your partner	£
-----	---	--------------	---

d If you are a lone parent and are **not** claiming Adult Dependants' Grant **go to f**

Give an estimate of your husband's, wife's, partner's or other adult dependant's income over the student's academic year 2011/12.

	Husband, wife or partner	Other adult dependant
Income from earnings after deductions	£ Husband, wife or partner	£ Other adult dependant
Adoption Agency payments	£ Husband, wife or partner	£ Other adult dependant
Any disability pension or benefit	£ Husband, wife or partner	£ Other adult dependant
Child Benefit	£ Husband, wife or partner	£ Other adult dependant
Guardian's Allowance	£ Husband, wife or partner	£ Other adult dependant
Fostering or Boarding Out payments <input type="text" value="n"/>	£ Husband, wife or partner	£ Other adult dependant
Residence Order Allowance	£ Husband, wife or partner	£ Other adult dependant
Child Tax Credit	£ Husband, wife or partner	£ Other adult dependant
Working Tax Credit	£ Husband, wife or partner	£ Other adult dependant

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

	Husband, wife or partner	Other adult dependant					
All other income	£ Husband, wife or partner	£ Other adult dependant					
If other, what is it?	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>					
If applying for Adult Dependants' Grant, please indicate who the adult dependant is.							
Your husband	<input type="checkbox"/>	Your wife	<input type="checkbox"/>	Your partner (if you are 25 or over)	<input type="checkbox"/>	Other adult dependant	<input type="checkbox"/>

e Give details of financial commitments which you, the student, were paying before the start of the course and that you, your husband, wife or partner will continue to pay for you during the academic year 2011/12. e

Type	£	Type	£
Type	£	Type	£

f **Answer this question if you are applying for Childcare Grant.**
 Do you, your husband, wife or partner receive, or expect to receive, the childcare element of Working Tax Credit? Yes No

If 'Yes', you cannot also get Childcare Grant. But you can choose to receive Childcare Grant **instead** of the childcare element of Working Tax Credit if you wish. n

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about your family

If you are a **dependent student**, go to question **a**.

If you are an **independent student with a partner**, go to the **Student Declaration** on **pages 15/16** and then pass this form to your partner to complete **section 9**.

If you are a **single independent student**, go to the **Student Declaration** on **pages 15/16**.

a With which parent do you normally live, or have more contact?

What we mean by 'parent', for the purposes of working out your household income, can change depending on when you started in higher education. 

Mother Father

or


Both N/A



b What is the marital status of this parent?

- Single
- Living with a partner
- Married/civil partnership
- Separated
- Divorced/dissolved civil partnership
- Widowed/surviving civil partner


Now please read and sign the **Student Declaration** on **pages 15/16** and then pass this form to the person(s) who you have indicated in 'question a' to complete **section 9**.

c Have your parents divorced, separated or been in a civil partnership which has been dissolved, since 1 September 2010? 

Yes No

Now please read and sign the **Student Declaration** on **pages 15/16** and then pass this form to the person(s) who you have indicated in 'question a' to complete **section 9**.

Student Declaration

Before signing and returning your completed form, you should read the Data Protection Statement in the accompanying notes. 

This declaration covers all of the student finance available to students for academic year 2011/12.

By signing this declaration you are confirming that you have read the specific terms and conditions about loans, Childcare Grant and Disabled Students' Allowances because they will affect you if you apply for them at any time in academic year 2011/12. If you don't apply for these in academic year 2011/12 their specific terms and conditions will not affect you.

Your application for financial support may be delayed unless you sign and date this declaration.

General 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 refused financial support, or prosecuted and my financial support withdrawn.
- I agree to give my ELB any information they require to process my application and agree to tell them immediately if my circumstances change in any way that might affect my entitlement to financial support. I understand that if I do not do this, I may not receive any further payments, and may have to repay the financial support I have already received.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full and I agree that such overpayment may be recovered by deduction from any future entitlement to financial support.

Loan Contract

- a I have read and understood 'Student Loans: A guide to terms and conditions' available at www.studentfinancenl.co.uk.
- b I acknowledge and agree that any loan(s) made to me by the Department for Employment and Learning, 'the lender' (which includes any person exercising functions on behalf of the Department for Employment and Learning pursuant to Article 4 (3) of the Education (Student Support) (Northern Ireland) Order 1998 as amended from time to time or successor legislation, 'the Order') will be on the terms set out in the Loan Request Form including these declarations and in Regulations which are made under Article 3 of the Order as amended from time to time.
- c I undertake to repay the lender any loan(s) made to me, together with all and any interest, penalties and charges which apply.
- d I agree that any loan(s) made to me as a consequence of the acceptance of my application by the lender is a/are contract(s) between me and the lender which binds me from the payment to me of the first loan advance and that the repayment of any such loan(s), together with all and any interest, penalties and charges which apply, will be due by me to the lender as a debt.
- e I agree that I shall be obliged to make repayment of my loan(s), together with all and any interest, penalties and charges which apply, to such address as shall be notified to me in writing and that any services in respect of my loan(s) may be provided at such address or other address(es) as the lender may from time to time determine and that the service of providing the loan is provided at the lender's principal address.
- f I agree that any action for repayment and/or in respect of or in connection with my loan(s) and/or all and any interest, penalties and charges which apply, will be brought before the ordinary civil courts and shall be governed by the general rules of civil procedure.
- g I agree that my request for a loan, the loan and the contract between me and the lender shall be governed by the law of the place of my home address as stated in this form (or, if my address is outside the United Kingdom, the law of Northern Ireland).
- h I irrevocably agree that the courts of the part of the United Kingdom in which my home address stated in this form is situated (or the English, Scottish and Northern Ireland courts where my address is outside the United Kingdom) shall have 'non-exclusive' jurisdiction to hear any action or proceedings arising out of or in connection with the loan and the contract between me and the lender and I irrevocably submit to the jurisdiction of those courts and waive any objection to the jurisdiction of those courts, provided that this shall not limit the lender's rights to take proceedings against me in any other court of competent jurisdiction.
- i I agree that from the date I submit this form until the date when my loan(s), together with all and any interest, penalties and charges which



apply, is fully repaid I will notify the lender of any changes in the personal details (including National Insurance Number) and contact details I have provided as required in accordance with the Regulations referred to in paragraph b.

j In the event that I leave the United Kingdom to reside outside the United Kingdom or that for any other reason I am outside the UK tax system, I undertake to inform the lender in accordance with the Regulations referred to in paragraph b and I undertake to provide the lender with my new and any subsequent contact details until my loan, together with all and any interest, penalties and charges which apply, is fully repaid.

k I agree to take all future action requested by the lender and provide the lender with all information required to ensure repayment, in accordance with the Regulations referred to in paragraph b.

l If I breach any of the terms under which any loan(s) will be made I agree that I will be obliged to pay any charges and penalties which may apply under the Education (Student Support) (NI) Order 1998 and the Regulations made under that Order, as amended from time to time or successor legislation and/or Regulations.

m I understand that the Student Loans Company will check my National Insurance Number and personal details with the Department for Work and Pensions (DWP). If I do not know my National Insurance Number, or if the number I provide cannot be authenticated, DWP will trace and give my number to the lender.

n If I have broken the terms of this contract I agree that the lender may share information held about me and my account with any person, including the government or a government agency of another country, who may assist in establishing my whereabouts and/or in taking action to recover outstanding loan amounts.

Disabled Students' Allowances (DSAs)

- I understand that any equipment I receive through DSAs must be used for my course of study and my ELB is not responsible for paying any repair costs.

Childcare Grant

- I understand that if I do not take up my childcare, or if I change to a childcare provider who is not registered or approved, I will have to pay back any overpayment.
- I understand that if I do not provide the evidence of childcare costs within the timescales set, I might lose my entitlement. Also if my payments to my childcare provider are different from the estimates I provide, I understand that further payment will increase or decrease accordingly, or if no further Childcare Grant payments are due to be paid to me, I may be liable to repay any difference.
- I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from the childcare element of the Working Tax Credit and I agree to tell my ELB immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support.

Customer Reference Number

Your full name
(in BLOCK CAPITALS)

Your signature Date

Bursary and scholarship data sharing consent will not affect your entitlement to any other financial support available.

If you started your course in academic year 2006/07 or after you may be eligible for a bursary or scholarship. In order for your university or college to determine and pay any non-repayable bursary or scholarship to which you may be entitled, we will need to share some of your personal, financial and course details as well as information about your eligibility for student finance with them. Most universities and colleges will not pay bursaries and scholarships if you do not give consent.

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

! The relevant person(s) you indicated in section 8 must complete section 9, as well as the declaration(s) on page 25.

Please pass this form to them now.

If you are a single independent student please go to page 28 to finalise your application.

financial details for the tax year 2009-10 for parents and partners

What details do I need to provide in this section?

In this section of the form you need to tell us some personal details and what your financial income was for the tax year 2009-10. You **must** tell us your 2009-10 income details as we cannot accept amounts from any other tax year. We need your income amounts so we can work out what the student(s) you are supporting are entitled to.

Quick start guide

Section 9 is divided into 5 parts, this guide gives you a quick summary of each part.

Part A

Tell us your name and address and some other personal information.

Parts B and C

Answer every question, providing income amounts where appropriate.

Part D

Answer every question, telling us about any income deductions you had during the tax year 2009-10.

Part E

If you have any children who are financially dependent on you, tell us about them here.

What happens if my household income has dropped since tax year 2009-10?

If your household income has dropped by 5% since tax year 2009-10 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2011-12 instead of your actual income from tax year 2009-10 when calculating the student's entitlement. However, there must be at least a 5% drop in the **overall household income** (not just your own income) between these two tax years for us to do this and we will ask for evidence of your 2011-12 income at the end of that tax year.

financial details for the tax year 2009-10 for parents and partners

Part A – Your personal details

Person 1

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth / /

Place of birth
(name of town or village exactly as it appears
on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

Person 2

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth / /

Place of birth
(name of town or village exactly as it appears
on your birth certificate or passport)

Home address

Postcode

Home telephone number

Email address

You do not have to disclose your financial information to the student.

If you would like to provide it separately, you can download an Assessment of Financial Circumstances (PFF2) form 2011/12 from www.studentfinanceni.co.uk and return it to us.

Alternatively, you can have the form sent to you by ticking this box:

Person 1

Send me a separate form

 Tick

Person 2

Send me a separate form

 Tick

financial details for the tax year 2009-10 for parents and partners

Part B - Your financial information

You do not need to submit with this form any evidence in support of the financial information you provide in this section. However, it is important that you keep all evidence relating to the financial year 2009-10, as you may be asked to provide us with this evidence at a later date.

Q1a **If you are the student's parent, step-parent or parent's partner, you must answer this question.**

Give your total gross taxable income (before deductions) from all sources received from 6 April 2009 to 5 April 2010.

Person 1


Person 2

Total gross taxable income

If you are the student's partner, you must answer this question.

Give your total gross taxable income (before deductions) from all sources received from 6 April 2009 to 5 April 2010.

Total gross taxable income


Q1b Was the total gross taxable income £15,000 or less for each of the tax years 2008-09 and 2009-10? 

Yes No

if 'Yes' go to part E

if 'No' continue

Instructions

- Please give financial details for the tax year from **6 April 2009 to 5 April 2010**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.
- 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 in tax year 2009-10.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. 

! Please note that if you leave any questions blank we will not be able to process this application.

Q2a Did you receive Working Tax Credits or Child Tax Credits?

Person 1
 Yes No

Person 2
 Yes No



Q2b Did you receive Income Support?

Yes No

Yes No

financial details for the tax year 2009-10 for parents and partners

Q3 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

- a Total income from salary / wages 
- b Total income from taxable state benefits 
- c Total income from occupational pension(s)
- d Total income from private pension(s)

Total income received

Person 1

Yes No

£

£

£

£

£

Person 2

Yes No


£

£

£

£

£

Q4 Did you receive any income from a state retirement pension? 

- a Total non-lump sum amount received
- b Total lump sum amount received

Person 1

Yes No

£


£

Person 2

Yes No

£

£

Q5 Did you receive any income from savings and investments? 

- a Total **interest** from UK banks, building societies and unit trusts
- b Total income from UK life insurance gains, securities and partnerships
- c Total income from UK investments and dividends
- d Total income from foreign investment and dividends

Person 1

Yes No

£

£

£

£

Person 2

Yes No

£

£

£

£

financial details for the tax year 2009-10 for parents and partners

Q6 Did you receive any taxable benefits in kind? 

Person 1
 Yes No

Person 2
 Yes No

Total income received

£

£


Q7 Did you receive any other income during the 2009-10 tax year that you **haven't** yet told us about?

Person 1 Yes → Go to Part C
 No → Go to Part D


Person 2 Yes → Go to Part C
 No → Go to Part D

Part C - Other income

Instructions

- Complete part C in the same way you completed part B giving financial details for the tax year from **6 April 2009 to 5 April 2010**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. 

The notes contain a breakdown of what we want you to include for each question as well as where to find individual amounts on some of the financial documents you might have.

Q1 Did you receive any income from self-employment? 

Person 1
 Yes No

Person 2
 Yes No

a Total taxable profit from businesses

£

£

b Total taxable profit from partnerships

£

£

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

Yes No


Yes No

Total taxable income minus expenses that are not included on your P60 or P11D

£

£

financial details for the tax year 2009-10 for parents and partners

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

Total income received

Person 1


Yes No

£

Person 2

Yes No

£

Q4 Did you receive any income from property lettings? 


Total income received

Yes No

£

Yes No

£

Q5 Did you receive any income from UK trusts? 


Total income received

Yes No

£

Yes No

£

Q6 Did you receive any foreign income? 


Total income received

Yes No

£

Yes No

£

Q7 Did you receive any income from an overseas pension? 


Total income received

Yes No

£

Yes No

£

Q8 Did you receive any other overseas income and gains? 

Total income received

Yes No

£


Yes No

£


financial details for the tax year 2009-10 for parents and partners


Part D – Income deductions

Instructions

- Complete part D in the same way you completed part B giving financial details for the tax year from **6 April 2009 to 5 April 2010**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. 

Q1 Did you pay any private pension contributions?

Person 1
 Yes No



Person 2
 Yes No



Total amount you paid

£

£

Q2 Did you pay any Additional Voluntary Contributions (AVCs)?


Person 1
 Yes No



Person 2
 Yes No



Total amount you paid

£

£

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

Person 1
 Yes No


Person 2
 Yes No


Total amount on which you claimed tax relief

£

£

financial details for the tax year 2009-10 for parents and partners

Part E – Your dependants

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

Q1 Child dependants not in further or higher education in academic year 2011/12

Include unearned income for **all** dependants. Only include earned income details for persons aged 16 and over. Do not count casual earnings of persons under 16.

Full name	Date of birth	Income for the year
	(DD MM YYYY)	

Q2 Child dependants in further or higher education in academic year 2011/12

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

If the student is your partner, please include any children they named in section 6 of this form if the children have applied for student finance.

Full name	Date of birth	School, college or university	Course	Are they receiving financial support? If so, from which authority or organisation?
	(DD MM YYYY)			

Declaration for parents and partners

Before signing, you should read the Data Protection Statement in the notes that accompany this form. 

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.

Person 1

Your full name (in BLOCK CAPITALS)

Your signature

Date


Person 2

Your full name (in BLOCK CAPITALS)

Your signature


Date

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

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

If the student(s) 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.



You must now pass this form back to the student.


Deadline

It is very important we receive this form with all the appropriate evidence by **30 June 2011**. This means you can be confident the student will receive their first payment at the start of term.

Please remember if the deadline passes we will do our best to process this application as soon as possible, however the first payment may not be available at the start of term.

Checklist

Before returning this form, please make sure you have done the following:

- Fully answered all questions that apply to you Tick
- Enclosed all the documents we have asked for as evidence where you have seen this icon next to a question  Tick
- Signed and dated the relevant declaration(s) Tick

Within 6 weeks of returning your completed application form with all the relevant evidence, you will be sent a letter showing the amount of financial support you will receive.



Please remember to pay the correct postage.

You must return your completed form to the ELB address which can be found in section 9 of the booklet 'A guide to financial support for higher education students in 2011/12' or on the Education and Library Board finder available online at www.studentfinancenl.co.uk.