

# Application for Student Finance for continuing students **2017/18**

**PR1**  
Form

You can also apply online at [www.studentfinanceni.co.uk](http://www.studentfinanceni.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 (DoH) or the Student Awards Agency Scotland (SAAS).

**We have provided guidance notes to help you 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.

## When do I send my form?

To make sure you receive your first payment at the start of term, you **must** return this form and all of the evidence we need by **30 June 2017**.

We will do our best to process your application as soon as possible, however if the deadline date has passed, your first payment may not be ready for the start of term.

If your application form is returned more than 9 months from the start of your academic year it won't be processed, and you may lose your full entitlement to student finance for this academic year.

# 1

## finance available

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

- Maintenance Loan
- Tuition Fee Loan
- Parents' Learning Allowance
- Adult Dependents' Grant
- Maintenance Grant
- Travel Grant
- Disabled Students' Allowances
- Childcare Grant
- Special Support Grant
- Bursaries and Scholarships

You can find more detailed information on what is available and what you might be entitled to at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)

### **What if I have questions?**

If you have questions you can:

- visit [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)
- call us on **0300 100 0077**. Our opening hours are Monday to Friday 8.00am to 8.00pm and Saturday and Sunday 9.00am to 4.00pm.

### **Where do I send my form?**

You must return your completed form to the Education Authority (EA) address which can be found on the back of this form, the covering letter sent with this form or on the EA finder available online at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)



**Remember to pay the correct postage or we may not receive your form.**

## finance available

### You can apply in 5 easy steps

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

#### Step 1

##### For all students

- Complete sections 2-4.
- Remember 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.



After you've completed Step 1 and if you **only** want to apply for a Tuition Fee Loan or a Maintenance Loan not based on household income 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 Special Support Grant, please tick this box.  **Tick**  
Detailed information about who can qualify for 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 you should now 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.
- If you do not wish to apply for student finance based on household income, your parent(s) or partner do not need to complete section 9.

#### Step 5

##### For all students

- Make sure that you read and sign the **Student Declaration on pages 16 and 17**. If you asked someone to complete section 9, make sure that they have signed **their declaration(s) on page 26**.

### Other student finance available

#### Childcare Grant (CCG)

If you want to apply for CCG you'll need to:

- complete and return this form **and**
- complete an Application For Help With Childcare Costs (CCG1).

You can download the CCG1 form at:

[www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)

Tick the box below if you want us to send you a CCG1 form instead.

Send me a CCG1 form:  **Tick**

#### Disabled Students' Allowances (DSAs)

If you want to apply for DSAs you'll need to:

- complete and return this form **and**
- complete a Disabled Students' Allowances Application Form (DSA slim).

You can download the DSA slim form at:

[www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)

Tick the box below if you want us to send you a DSA slim form instead.

Send me a DSA slim form:  **Tick**

## 2

## personal details

Customer Reference Number











## Personal details

a Title Mr  Mrs  Miss  Ms 

Forename(s)

Surname

Any previous names you may be known by

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 address.



## Home address


Postcode

## Term-time address


Home phone number

Postcode

Date you moved or will move to this address

**DAY**  **MONTH**  **YEAR**   

Mobile phone number

Email address

## Current relationship status

c Tick one box below to show your status. Only send evidence if this has changed since your last application.

 Single (never married/civil partnership)

 Living with a partner

 Married/civil partnership


Please give the date of marriage/civil partnership

**DAY**  **MONTH**  **YEAR**   
 Separated

 Divorced/dissolved civil partnership

 Widowed/surviving civil partner


## 2

## personal details

**Armed Forces**

d1 Are you a member of the Armed Forces?   Yes  No

d2 Are you a family member of someone in the Armed Forces?  
(for example: spouse or child)   n  e Yes  No

## 3

## about your course and your university or college

a Full tuition fee amount for this academic year £

Please remember your tuition fee amount can change each academic year. If you are unsure about the tuition fee amount you'll be charged, speak to your university or college.

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 academic year 2016/17? Yes  No  if 'Yes' go to e2

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

about your course and your  
university or college**d University or college details**

University or college name and address

	Postcode

UCAS personal identification number

--	--	--	--	--	--	--	--	--	--	--	--

UCAS university or college code

--	--	--

UCAS campus code (if applicable)

--

**Course details****e1**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 (for example, BSc Physics)

--	--	--	--	--	--	--	--

Course start date

MONTH	YEAR						
<table border="1"><tr><td></td><td></td></tr></table>			<table border="1"><tr><td></td><td></td><td></td><td></td></tr></table>				

Course end date

MONTH	YEAR						
<table border="1"><tr><td></td><td></td></tr></table>			<table border="1"><tr><td></td><td></td><td></td><td></td></tr></table>				

Course length (years)

--	--	--	--

## about your course and your university or college

**e2**

Year of course  Foundation  Third year  
 First year  Fourth year  
 Second year Other (give details)

If the course is franchised to another university or college, give their address below

  
  
 Postcode 

**f**

### Course type (please tick one box):

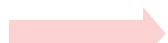
Full-time undergraduate

#### Initial Teacher Training (ITT) courses

Flexible postgraduate ITT




Part-time undergraduate ITT




Part-time ITT  (excluding first degrees)



Full-time postgraduate ITT

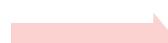
#### Answer both questions

Number of weeks you will be studying full-time in this academic year.

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

#### Other course types

Full-time distance learning



Do you have a disability which prevents you from attending your university or college in person?

Yes  No  

Full-time foundation degree

Full-time involving a placement (sandwich course)

**g1**

In this academic year, are you eligible to apply for a bursary, excluding social work bursary from any of the following? 

- National Health Service (NHS)
- Department of Health (DoH)
- Student Awards Agency Scotland (SAAS)

Yes  No

**g2**

If 'Yes', is this bursary: 

Income assessed

Non-income assessed

**Term details****h**

Where will you live during this academic year?

Term 1      Living with parent(s)  Elsewhere or own home   
 Term 2      Living with parent(s)  Elsewhere or own home   
 Term 3      Living with parent(s)  Elsewhere or own home

**i**Where will you spend most of your time this academic year? 

Term 1      University or college  Study abroad  Work placement   
 Term 2      University or college  Study abroad  Work placement   
 Term 3      University or college  Study abroad  Work placement

if you have ticked 'University or college'  
for all 3 terms **go to section 4**

**j**

Have you been accepted onto the Erasmus exchange scheme?

Yes  No

if 'Yes' and/or you'll be studying abroad  
**go to section 4**

**Placement details****k**Where will your placement be? 

Abroad  UK/ROI  Don't know

Placement name and address


Postcode 

Is the placement:

paid  
 unpaid

If '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.

## your UK bank or building society account details

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

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan.

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.

You can update your bank details at any time by logging into your student finance account at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)

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 Student Contribution Loan, 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** 

Your tuition fee is set by the university or college you go to. You can apply for a Tuition Fee Loan to cover your fees. This will be paid directly to your university or college.

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

£

**Student Contribution Loan** 

The Student Contribution Loan is for students studying at a relevant institution of higher education in the Republic of Ireland.

Amount of Student Contribution 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

We need you to give the name and address of two additional contacts. We'll only contact them if we can't get in touch with you, for example if you move address and forget to tell us. By entering these details, you're confirming you've told your additional contacts about this and they're happy for Student Loans Company to contact them if necessary.

### Contact 1

### Contact 2 (Contact 2 must live at a different address from Contact 1)

Forename(s)

Forename(s)

Surname

Surname

Relationship to you

Relationship to you

Address

Address

Postcode

Postcode

Country

Country

Phone number

Phone number

# 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 care of a person under the age of 18 on the first day of the academic year? **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.
- You have applied for student finance before, and the parent who was assessed for a contribution has 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've ticked any of the boxes above, you will be contacted for evidence if your situation has changed since last year and subject to this, you may be considered independent.**

**If you haven't ticked any of the boxes above you're a dependent student.**

## 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 this academic year.

**n** £

What is the source of this income?

### Payments from an employer

**b1** Will your employer be releasing you to attend your course this academic year?

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

**Yes**  **No**  if 'No' go to c

£

**b2** During this academic year, 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

**c** Give details of any children who will be wholly or mainly financially dependent on you during this academic year.

Your child's income should include their income from all sources for tax year 2015-16 after Income Tax and social security contributions.

Child's full name

Date of birth

**e**

Relationship to you

Who will they live with?

Child's income

**n** **e**

	(DD MM YYYY)			(£)
--	--------------	--	--	-----

## 7

## Parents' Learning Allowance, Adult Dependents' Grant and Childcare Grant

Only complete this section if you want to apply for Parents' Learning Allowance, Adult Dependents' 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** Give the total estimated income after Income Tax and National Insurance deductions in this academic year for: 

You £  Your partner £

How much of this will be Child Tax Credit for this academic year?

You £  Your partner £

**Only answer this question if you are applying for Childcare Grant.**

**d** During the academic year, do you or your partner expect to receive:

- the childcare element of Working Tax Credit; or
- Tax-Free Childcare from HM Revenue and Customs (HMRC); or
- Childcare Allowance from the NHS 

Yes  No

**!** If 'Yes', you can't get Childcare Grant and receive childcare support from one of these sources at the same time. You can still apply for Childcare Grant, however, you'll only get it if you stop receiving support from these sources.

**e1** Are you applying for Adult Dependents' Grant?  Yes  No if 'No' go to f

**e2** Who is your adult dependant? husband,  
wife,  
civil partner  
or partner (if you are over 25)  go to f

or partner (if you are over 25)

other adult dependant

go to f

go to e3

**e3** Will your other adult dependant's income be more than £3,873 in this academic year?  Yes  No

**!** If 'Yes' you won't be able to receive Adult Dependents' Grant

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

e4

Give your other adult dependant's income for tax year 2015-16 

### Income

All salary/wages and self employed income  
(including income from property)

£

All pensions (including private, occupational and state)

£

All gross taxable income and interest from savings,  
investments and dividends

£

Taxable state benefits

£

All other taxable income

£

### Deductions

Private Pension contributions and  
Additional Voluntary contributions (AVCs)

£

Allowable expenses on which tax relief is claimed

£

**Only complete this question if you started your course in or before academic year 2013/14.**

f

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 during this academic year. 

Please enter the annual amount.

Type <input type="text"/>	£ <input type="text"/>	Type <input type="text"/>	£ <input type="text"/>
Type <input type="text"/>	£ <input type="text"/>	Type <input type="text"/>	£ <input type="text"/>
Type <input type="text"/>	£ <input type="text"/>	Type <input type="text"/>	£ <input type="text"/>
Type <input type="text"/>	£ <input type="text"/>	Type <input type="text"/>	£ <input type="text"/>

## 8

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 and 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 and 16**.

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

Mother  Father

or

Both  N/A

**b** What is the relationship status of this parent at the time of applying?

Single (never married/civil partnership) 

Living with a partner

Married/civil partnership

Separated

Divorced/dissolved civil partnership

Widowed/surviving civil partner

Have your parents divorced, separated or been in a civil partnership which has been dissolved, since 1 September 2016? 

Yes  No

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

#### What you need to do next

Read and sign the **Student Declaration on pages 15 and 16** and then pass this form to your parent(s).

#### What your parent(s) need to do

The parent(s) you normally live with should complete **section 9**. If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also 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 2017/18.

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 2017/18. If you don't apply for these in academic year 2017/18 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 may not receive financial support, any support I have had may be withdrawn and I could be prosecuted.
- I agree to give the Education Authority 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 the booklet 'Student Loans: A guide to terms and conditions' available online at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)
- b I acknowledge and agree that any loan(s) made to me by the Department for the Economy (which includes any person exercising functions on behalf of the Department for the Economy, together with any successor(s) thereto (the "lender") pursuant to Article 4 (3) of the Education (Student Support) (Northern Ireland) Order 1998 (as amended) and/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.

- c I acknowledge and agree that in the event that I have: (i) reached the age of 18 years; and (ii) have entered into one or more agreements for a loan under the Order (and relative secondary legislation) before I reached the age of 18 years, upon signing this declaration I am agreeing to ratify any and all such student loans. I understand that ratification of any agreement for a loan made with me before I reached the age of 18 years is a statutory precondition of my eligibility for student support after attaining the age of 18 years.
- d I undertake to repay the lender any loan(s) made to me, together with all and any interest, penalties and charges which apply.
- e 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.
- f 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.
- g 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.
- h 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).
- i 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



not limit the lender's rights to take proceedings against me in any other court of competent jurisdiction.

- j** 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.
- k** 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.
- l** 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.
- m** 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.
- n** 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.

- o** 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 the Education Authority is not responsible for paying any repair costs.

#### Childcare Grant (CCG)

- 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: (i) the Working Tax Credit; (ii) Tax-Free Childcare; and/or (iii) the NHS Childcare Allowance; and I agree to tell the Education Authority immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that the Education Authority reserves the right to share my personal data with HMRC to check whether I am in receipt of childcare support from HMRC.

Customer Reference Number

Your full name  
(in BLOCK CAPITALS)

Your signature  Today's **DAY** **MONTH** **YEAR**  
date

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

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 tax year 2015-16 for parents and partners

## Who needs to complete this section?

Section 8 of this form tells you who needs to complete this section.

## What details do I need to provide in this section?

You need to tell us some personal details and what your financial income was for tax year 2015-16. You **must** tell us your 2015-16 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 is entitled to.

## About this section

Section 9 is split into five parts:

**Part A** - Tell us your name and address and some other personal information.

**Parts B and C** - Answer every question.

**Part D** - Answer every question and tell us about any income deductions for tax year 2015-16 where appropriate.

**Part E** - Tell us about any children who are financially dependent on you.

## How to complete this section

### If you are a single parent of the student

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

### If there are two parents in the student's household

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

### If you are an independent student with a partner

Your partner needs to enter their information as Person 1, leave Person 2 blank

**If you're self assessed – read page 13 of the notes for more information.** 

**If you're not self assessed – you can use your P60 to complete this section.**

## What happens if my household income has dropped since tax year 2015-16?

If your household income has dropped by 5% or more since tax year 2015-16 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2017-18 instead of your actual income from tax year 2015-16 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 2017-18 income at the end of that tax year.



# financial details for tax year 2015-16 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 tax year 2015-16, as you may be asked to provide us with this evidence at a later date.

**Q1**

**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 2015 to 5 April 2016.

**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 2015 to 5 April 2016.

**Total gross taxable income**

£

### Instructions

- Please give gross financial details for tax year **6 April 2015 to 5 April 2016**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.



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

**Q2a** Did you receive Working Tax Credit or Child Tax Credit?

**Person 1**

Yes  No

**Person 2**

Yes  No

**Q2b** Did you receive Income Support?

**Person 1**

Yes  No

**Person 2**

Yes  No

**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)

Person 1

Yes  No

£

£

£

£

Person 2

Yes  No

£

£

£

£

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

- a** Total lump sum amount received
- b** Total non-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 tax year 2015-16 for parents and partners

**Q6** Did you receive any taxable benefits in kind? 

**Person 1**

Yes  No

**Person 2**

Yes  No

Total income received from taxable benefits in kind

£

£

**Q7** Did you receive any other income during tax year 2015-16 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 gross financial details for tax year **6 April 2015 to 5 April 2016**.

**Q1** Did you receive any income from self-employment? 

**Person 1**

Yes  No

**Person 2**

Yes  No

**a** Total adjusted profit from businesses

£

£

**b** Total adjusted profit from partnerships

£

£

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

**Person 1**

Yes  No

**Person 2**

Yes  No

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

£

£

**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 tax year 2015-16 for parents and partners

## Part D – Income deductions

### Instructions

- Complete Part D in the same way you completed Part B giving gross financial details for tax year **6 April 2015 to 5 April 2016**.

**Q1** Did you pay any private pension contributions?

Total amount you paid

Person 1  
 Yes  No

Person 2  
 Yes  No

£

£

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

Total amount you paid

Person 1  
 Yes  No

Person 2  
 Yes  No

£

£

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

Total amount on which you claimed tax relief

Person 1  
 Yes  No

Person 2  
 Yes  No

£

£

## financial details for tax year 2015-16 for parents and partners

Part E – Your dependants [n]

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 2017/18** [n]

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 2017/18**

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 the student I am supporting may have their financial support withdrawn and I may be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that the Education Authority 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

**X**

Today's date DAY    MONTH    YEAR

## Person 2

Your full name (in BLOCK CAPITALS)

Your signature

**X**

Today's date DAY    MONTH    YEAR

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

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.**

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.

## Deadline

To make sure the student receives their first payment at the start of term, this form must be returned with all of the evidence we need by **30 June 2017**. We will do our best to process this application as soon as possible, however if the deadline date has passed, the first payment may not be ready for the start of term.



**Now pass this form back to the student.**

## Additional notes

If you are providing extra information below please clearly mark what section and question the information is about.

## Additional notes

If you are providing extra information below please clearly mark what section and question the information is about.

# 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
- Completed the loan request section if you are applying for a Maintenance Loan, Tuition Fee Loan or Student Contribution Loan Tick
- Asked your parent(s) or partner to complete section 9 if applying for student finance based on your household income Tick

When your completed application form with all the relevant evidence has been processed you will be sent a letter showing the amount of financial support you will receive.



**Remember to pay the correct postage or we may not receive your form.**

**You must return your completed form to the EA address which can be found below, on the covering letter sent with this form or on the EA finder available online at [www.studentfinanceni.co.uk](http://www.studentfinanceni.co.uk)**