

# Current Year Income Assessment 2019/20

When calculating a student's financial entitlement, the total household income from tax year 2017-18 is normally taken into consideration. However, if your total household income has dropped by 5% or more since tax year 2017-18, this entitlement can be assessed based on the current tax year.

Complete this form to give your estimated income for tax year 2019-20. If you're awarded a current year income assessment, we'll use your finalised 2019-20 household income to work out how much the student can get if they apply for funding based on household income in the 2020/21 academic year. If your income will fall by a further 5% in 2020/21, you can apply for a further current year income assessment.

To find out how we'll use the information you provide go to [www.studentfinanceneni.co.uk/privacynotice](http://www.studentfinanceneni.co.uk/privacynotice) to read our Privacy Notice before completing this form.

## Providing your details separately

If you want to give your income details separately you can print off another copy of this form at [www.studentfinanceneni.co.uk](http://www.studentfinanceneni.co.uk)

### 1 Student's details

Forename(s)

Surname

Date of birth

 /  /    

Student Customer Reference Number

              

### 2 Your personal details

#### Person 1

Forename(s)

Surname

Date of birth   /   /

Your Customer Reference Number

              

Relationship to the student

#### Person 2

Forename(s)

Surname

Date of birth   /   /

Your Customer Reference Number

              

Relationship to the student

**You must give us your financial details for the tax year 2017-18**

**This is so we can compare your actual income from tax year 2017-18 with your estimated income for tax year 2019-20.**

How did you tell us your financial details for tax year 2017-18?

 Online

 Paper

How did you tell us your financial details for tax year 2017-18?

 Online

 Paper

### 3 Your financial information for the tax year 2019-20

- Please answer all questions with your expected income between **6 April 2019** to **5 April 2020**
- The total amount should include all income for the full tax year. For example, if you were made redundant part-way through the year, you would need to include earnings from 6 April 2019 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2020
- If you don't expect to receive any income from the source a question asks about, please enter N/A or None as your answer
- If any questions are left blank we won't be able to process this application and the form will be sent back to you

|  | Person 1               | Person 2               |
|--|------------------------|------------------------|
| <b>3.1 Total expected income from salary or wages</b><br>(before deductions)   | £ <input type="text"/> | £ <input type="text"/> |
| <b>3.2 Total expected income from Benefits in Kind</b>   | £ <input type="text"/> | £ <input type="text"/> |
| Taxable benefits in kind are other benefits that you are entitled to, but do not form part of your salary. For example, a fuel allowance or company car. |                        |                        |
| <b>3.3 Total expected income from self-employment</b>  | £ <input type="text"/> | £ <input type="text"/> |
| <b>3.4 Total expected taxable income from land and property</b>  | £ <input type="text"/> | £ <input type="text"/> |
| <b>3.5 Total expected income from pensions</b>   |                        |                        |
| Give the amount of pension you expect to get from the first month until the end of the tax year.   |                        |                        |
| <b>Type of pension</b><br>(For example state pension or widow's pension)   |                        |                        |
| <input type="text"/>   | £ <input type="text"/> | £ <input type="text"/> |
| <input type="text"/>   | £ <input type="text"/> | £ <input type="text"/> |
| <input type="text"/>   | £ <input type="text"/> | £ <input type="text"/> |
| <b>3.6 Total expected income from building society and/or bank investments and savings</b><br>(before tax)   | £ <input type="text"/> | £ <input type="text"/> |

You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

### 3.7 Total expected income from taxable state benefits

Give the amount of state benefits you expect to get from the first month until the end of the tax year.

**Type of social benefit** (For example unemployment benefit, incapacity benefit)

**Person 1**

**Person 2**

### 3.8 Additional taxable income

Give the amount you expect to get from any other sources of taxable income not yet stated.

**Type of other taxable income**

(For example, redundancy or compensation or loss of job, even if you don't expect to pay tax on it)

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



## 5 Next Steps

