

cyllid myfyrwyr cymru student finance wales

Yes



Yes

No

Current Year Income Assessment Form

Before you complete this form For the student to be assessed based on your estimated income for the tax year 2022-23 we need to be able to compare your estimated income with your actual income for tax year 2020-21. Person 1 Person 2 Have you told us your financial details for tax year 2020-21?

If 'No' you must give us your financial details. You can download

'Assessment of Financial Circumstances form' at: www.studentfinancewales.co.uk/pgparents

How do I complete this form?

Start by completing Section A and then work your way through the form. Depending on your circumstances you may not need to complete every section. Don't forget to sign the Declaration at the end.



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

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

Yes, but not just now. After tax year 2022-23 has ended, we will contact you and ask you to confirm, with evidence, your actual earnings for that tax year.

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

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



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Section 1 Personal details

Person 1 Person 2 Your Customer Reference Number Your Customer Reference Number Full name Full name Month Month Year Dav Year Date of birth Date of birth Address Address Postcode Postcode

If you want to provide your financial details separately, you can download another copy of this form at: www.studentfinancewales.co.uk/pgparents

Section 2 Financial information

Part A Your expected income for the tax year 2022-23

How to answer the questions in this section:

- If you answer 'Yes' to any of these questions you will need to provide the **total** amount of gross income you expect to receive for that income type.
- The total amount should include all earnings for the full tax year. For example, if you were made redundant part-way through the year, you need to include earnings from 6 April 2022 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2023.
- For pension payment questions, please tell us the amount of the pension you expect to receive from the first month you receive it until the end of the tax year.
- If you answer 'No' to any question, you are telling us that you do not expect to receive any income from that particular income type.

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

a Total expected income from salary / wages

- **b** Total expected income from taxable state benefits
- **c** Total expected income from occupational pension(s) If you receive a lump sum pension, only declare the amount you received that you paid tax on.
- **d** Total expected income from private pension(s)

Don't include payments from War Pensions

If you receive a lump sum pension, only declare the amount you received that you paid tax on.

Person 1	Person 2
Yes No	Yes No
1	1
£	£
£	£
£	£
£	£

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

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

Don't include income from any other benefits, including Universal Credit.

Section 2 Financial information – continued

		Person 1	Person 2
Q2	Do you expect to receive any income from a State Retirement Pension?	Yes No	Yes No
	a Total expected non-lump sum amount	£	£
	b Total expected lump sum amount	£	£
Q3	Do you expect to receive any income from savings and investments?	Yes No	Yes No
	a Total expected UK interest from UK banks, building societies and unit trusts	£	£
	b Total expected income from other savings and investments	£	£
	c Total income from UK investments and dividends	£	£
	d Total income from foreign investment and dividends	£	£
	Gross UK interest (before tax has been deducted) You must include interest you receive on bank, building society it is specifically non-taxable, for example, a non-taxable Individu		
Q4	Do you expect to receive any income from taxable benefits in kind?	Yes No	Yes No
	Total expected income from taxable benefits in kind	£	£
	Taxable benefits in kind are other benefits that you are entitled t salary. For example, a fuel allowance or company car.	o, but do not form	part of your
Q5	Do you expect to receive any other income during the 2022-23 tax year that you haven't yet told us about?	Yes – go to Part B	Yes – go to Part B
		No – go to	No – go to Part C

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Section 2 Financial information - continued

Part B Other income

		Person 1	Person 2
Q1	Do you expect to receive any income from self-employment?	Yes No	Yes No
	a Total adjusted profit from businesses	£	£
	b Total adjusted profit from partnerships	£	£
Q2	Do you expect to receive any income as a Minister of religion?	Yes No	Yes No
	Total expected income amount (minus expenses that would not normally show on a P60 or P11D)	£	£
Q3	Do you expect to receive any income from lump sums or from other taxable income sources?	Yes No	Yes No
	Total expected income from lump sums or other taxable income sources.	£	£
	For example, money received as compensation or from redundancy amount of your redundancy payment, even if you don't expect to page 1.		e the full
Q4	Do you expect to receive any income from property lettings?	Yes No	Yes No
	Total expected income from property lettings	£	£
Q5	Do you expect to receive any income from UK trusts?	Yes No	Yes No
	Total expected income from UK trusts.	£	£
	For example, payments from settlor-interested trusts and income from	om UK estates.	
Q6	Do you expect to receive any foreign income?	Yes No	Yes No
	Total expected foreign income	£	£
Q7	Do you expect to receive any income from an overseas pension?	Yes No	Yes No
	Total expected income from an overseas pension	£	£
Q8	Do you expect to receive any other overseas income and gains?	Yes No	Yes No
	Total expected other overseas income and gains	£	£

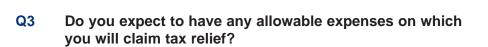
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Section 2 Financial information - continued

Part C Income deductions Person 1 Person 2 Q1 Do you expect to pay any private pension contributions? Total expected private pension contributions

Q2 Do you expect to pay any Additional Voluntary Contributions (AVCs)?

Total expected AVCs



Total expected allowable expenses on which you will claim tax relief

£	£
Yes No	Yes No
£	£

No

Yes

No

Yes

Declarations

Make sure you sign the declaration in ink. Digital signatures won't be accepted.

To find out how we'll use the information you provide go to **www.studentfinancewales.co.uk/privacynotice** to read our Privacy Notice before signing this form.

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

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

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not, I understand the student may not receive financial support, any support they have had may be withdrawn and I could be prosecuted.
- I agree to provide any further information in relation to the applicant's application for financial support as may reasonably be required, and I agree to provide immediate notice of, and details in relation to, any change in circumstances that might in any way affect this application for financial support.

Person 2

Perso	n 1
Your f	ull name (in BLOCK CAPITALS)
Your	signature
×	
Date	Day Month Year

Your fu	ull name (in BLOCK CAPITALS)
Your s	ignature
×	
Date	Day Month Year

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