


Applying for student finance based on household income form **2023/24**

About this form

Who should complete this form?

Complete this form if you want to change your student finance application to be based on your household income.

 Where you see this icon it means we need you to give supporting evidence. Details of the evidence needed will be shown where the icon appears.

If you leave any question blank we won't be able to process your application. If a question doesn't apply to you, enter 'None' or 'N/A' as the answer.

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

What sections should you complete?

All students need to complete sections **1, 2, 4 & 5** and read, sign and date the **declaration**.

Only complete section **3** if you want to apply for a Parents' Learning Allowance, Adult Dependants' Grant and/or Childcare Grant.

Your application to have your student finance based on your household income, or an application for Parents' Learning Allowance, Adult Dependants' Grant and/or Childcare Grant **must be received within 9 months from the start of your academic year**.

1 your personal details

1.1 Customer Reference Number

1.2 Personal details

Title

Mr Mrs Miss Ms

Forename(s)

Surname

Date of birth

Day - Month - Year



2 financial questions

Your Income

2.1 What is the total taxable unearned income, before deductions, that you expect to get in the academic year 2023/24?

do include any income from:

- bank or building society gross interest (excluding ISAs)
- property, lettings or rent
- dividends or investments
- trusts or sponsorships
- other payments received for attending the course

don't include any:

- earnings from full or part time work.
- Maintenance Loan or grant payments you may receive
- payments you receive from parents under a covenant
- Teacher Training Bursaries
- Higher Education Bursaries (for care leavers)
- Bounties paid by the armed forces to reservists
- Disablement or invalidity payments

£

What is the source of this income?

Payments from your employer

2.2 Will you be employed during the academic year 2023/24?

- No** – go to 2.5
- Yes**

2.3 Will your employer be specifically releasing you to attend your course for the academic year 2023/24?

- No**
- Yes** – how much will your employer pay you for time spent attending the course during this period? £

2.4 Will you or your employer pay any money into a pension fund on your behalf during the academic year 2023/24?

- No**
- Yes** – how much during this period? £

Dependent Children

2.5 Will you have any children who will be wholly or mainly financially dependent on you during academic year 2023/24?

- No** – go to 2.6
 Yes

2.5.1 Give details of the dependent children


When stating the child's income, include their income from all sources after income tax and social security contributions in tax year 2021-22.

Do Include any income the child gets from:

- working
- interest earned on savings
- investments
- any maintenance payments

Don't include income from:

- Government Child Trusts
- State Child Benefit
- Child Tax Credits
- the child element of Universal Credit

 **You must provide a photocopy of Birth Certificates and evidence of Child Tax Credits, the child element of either Working Tax Credit or Universal Credit and/or Child Benefits for each child named.**

If you have more than two dependent children, give details for each additional child on a separate piece of paper and attach to this form.

Child 1 full name

Relationship to you

Date of birth

Day Month Year

Who do they live with?

Income from all sources after income tax and social security

£

Child 2 full name

Relationship to you

Date of birth

Day - Month - Year
 - -

Who do they live with?

Income from all sources after income tax and social security

£

Additional Financial Support

2.6 Do you want to apply for any of the following:

- **Parents' Learning Allowance**
- **Adult Dependants' Grant**
- **Childcare Grant?**

For further information on Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant, go to:

www.studentfinancewales.co.uk

- No** – go to section 4
 Yes – go to section 3

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

3.1 Are you a lone parent?

- No
 Yes – go to 3.4

3.2 Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance?

- No – go to 3.4
 Yes – if you are a care leaver - go to 3.3

3.2.1 Did you start your course on or after 1 August 2018?

- No
 Yes – go to 3.4

3.3 Give the total estimated income after income tax and National Insurance deductions in the academic year 2023/24 for:
How much of this will be Child Tax Credit or the child element of Universal Credit for the academic year 2023/24?

You	Your partner
£ <input type="text"/>	£ <input type="text"/>
You	Your partner
£ <input type="text"/>	£ <input type="text"/>

Applying for a Childcare Grant

To apply for a Childcare Grant, as well as completing this form you **must** complete a Childcare Grant Form (CCG1). You can download this form at: www.studentfinancewales.co.uk

3.4 Answer this question if you are applying for Childcare Grant.

During the 2023/24 academic year, do you or your spouse, civil partner or cohabiting partner receive, or expect to receive:

- the childcare element of Working Tax Credit or Universal Credit; or
- Tax-Free Childcare from HMRC; or
- Childcare Allowance from the National Health Service (NHS)?

- No
 Yes – You can't get Childcare Grant if you receive childcare support from one of these sources at the same time. You can only apply for Childcare Grant if you stop claiming support from any of these sources.

Applying for Adult Dependants' Grant

You are not eligible for Adult Dependants' Grant for:

- your other adult dependant if their income is more than £3,923 in the academic year 2023/24.
- your cohabiting partner if you started your course before 1 August 2018 and were under 25 on the 1st day of the 1st academic year of your course.

3.5 Are you applying for Adult Dependants' Grant?

- No – go to 3.9
 Yes

3.6 Who is your adult dependant?

- Your husband
Your wife
Your civil partner
Your partner – go to 3.9
- other adult dependant

3.7 Will your other adult dependant's income be more than £3,923 for the academic year 2023/24?

- No
- Yes

3.8 Give your other adult dependants' income for the 2021-22 tax year.

Income

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

All income from pensions, including private, occupational and state

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

All gross taxable income from interest, investments and dividends

Taxable state benefits

All other taxable income (for example, money received as compensation or from redundancy. You must include the full amount of your redundancy payment, even if you don't expect to pay tax on it.)

Deductions

Private pension contributions and Additional Voluntary Contributions (AVCs)

Allowable expenses on which tax relief was claimed

3.9 Only complete this question if you started your course before 1 August 2018.

Give details of financial commitments you have before the start of the course which you, your husband, wife or partner will continue to pay for you during the academic year.

Financial commitments to include would be:

- household insurance
- medical insurance
- life assurance premiums
- mortgage repayments
- repayments under a loan agreement such as a Building Society home improvement loan, or maintenance payments for a dependant.

Type

£

Type

£

Type

£

If you need further space use the additional notes pages at the back of this form.

4 about your family

Your parent(s) or partner may have received a separate form asking them to provide details about their income. This must also be completed and returned to us.

4.1 Are you an independent student?

Yes – go to 4.2

No – go to 4.3

4.2 Please tick the relevant box that applies to you

You are 25 or over

You have care of a child under 18

You are married/in a civil partnership

You have supported yourself for 3 or more years

You are an orphan

You have no contact with your parents, and this will not change

It is impossible/impractical to contact your parents, or sending you money would place them in jeopardy

If you have ticked any of the boxes above, you will be contacted for evidence and, subject to this, you may be considered independent. Now go to the declaration on page 9.

4.3 Which parent do you normally live, or have the most contact with?

The following family members count for the purposes of income assessment:


- Your natural or adoptive parents (if both of them live with you)
- Your parent and their partner (if they have one)

Your parent's partner is defined as:

- Your stepmother or stepfather
- Your parent's same or opposite sex partner if they live together as if they were married or in a civil partnership



- Mother
- Father
- Both – go to Section 5
- Neither – go to Section 5

4.4 What is the marital status of this parent?

 Ask your parent to send evidence of their marital status if they are separated, divorced or have had their civil partnership dissolved.

They must send a copy of their:

- Decree absolute
- Dissolution order
- A letter from their solicitor confirming their status
- A conditional or final order

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

5 special support

If one of the categories below applies, you may qualify for Special Support.

5.1 To apply for Special Support tick the box(es) that are relevant to you.

You must send supporting evidence with your application. 

- I'm a lone parent (or a lone foster parent) with a child, or young person aged under 20 who is in full-time education below higher education level
- I have a partner who is also a full-time student, and one or both of us are responsible for a child, or young person aged under 20 who is in full time education below higher education level
- I have a disability and qualify for the Disability Premium or Severe Disability Premium
- I'm deaf and qualify for Disabled Students' Allowance
- I have been treated as incapable of work for a continuous period of at least 28 weeks
- I have a disability and qualify for Income-Related Employment and Support Allowance
- I'm waiting to go back to a course having taken agreed time out from that course due to an illness or caring responsibility that has now ended
- I'm aged 60 or over
- I'm entitled to Housing Benefit or the housing element of Universal Credit
- I'm entitled to Personal Independence Payment (PIP)
- I'm entitled to Disability Living Allowance (DLA)
- I'm entitled to Armed Forces Independence Payment (AFIP)
- None of the above

Now read, sign and date the declaration on the next page

declaration

- I can 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, and support I have had may be withdrawn and I could be prosecuted.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full.
- 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. Alternatively, you can request a copy by writing to the Student Loans Company Ltd (SLC) at 100 Bothwell Street, Glasgow, G2 7JD or by calling us on 0300 200 4050.

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

Day - Month - Year

next steps

Once your form is fully complete and the declaration has been signed and dated, you should return it to:

Student Finance Wales
PO Box 211
Llandudno Junction
LL30 9FU

Make sure you pay the correct postage



additional notes

If you're providing extra information clearly mark what section and question the information is about.