



**2023/24**

**PTMC**

## Application form for continuing part-time students

We welcome applications in Welsh. If you would prefer to apply in Welsh, a Welsh version of this form is available. Applying in Welsh will not delay your application. You can also apply online at [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

First name(s)

Surname

### About this form

#### What sections should you complete?

All students need to complete sections **1 and 2** and read, sign and date the terms and conditions. You'll also need to complete other sections of the form depending on what you want to apply for.



Students applying for Tuition Fee Loan only

Complete sections **3 and 8**

Students applying for Tuition Fee Loan and  
a Welsh Government Learning Grant and/or  
Maintenance Loan

Complete sections **3 to 9**

**Before completing this form, you should read the Privacy Notice on page 17 of the accompanying notes.**

-  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 we need can be found in the guidance notes.

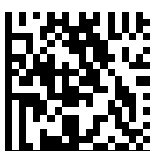
You may be eligible for a bursary or scholarship. In order for a university or college to determine and pay any bursary or scholarship to which you may be entitled, we will share some of your personal, financial and course details as well as information about your eligibility for student finance with them.

### Course Credits

Before applying, you need to know how many course credits you intend to study. Each module you study is worth a number of credits. You should agree how many credits you'll study with your university.

To apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or a Maintenance Loan, you need to be studying at a course intensity of at least **25%** in the academic year.

You can find out more about student finance and download our part-time guides at [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)



## Additional student finance

You may also be able to apply for additional financial support if:

- you have children or adults who depend on you financially; and/or
- you have a disability, long-term health condition, mental health condition or specific learning difficulty.

### Disabled Students' Allowance (DSA)

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

- complete and return this form **and**
- complete a Disabled Students' Allowance Application Form (DSA1).

You can download the DSA1 form at [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

Tick the box below if you want us to send you a DSA1 form instead.

Send me a DSA1 form

### Parents' Learning Allowance (PLA) and Adult Dependants' Grant (ADG)

If you want to apply for PLA or ADG you'll need to:

- complete and return this form **and**
- complete a Grants for Dependants' application form for part-time students (PTGFD).

You can download the PTGFD form at [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

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

Send me a PTGFD form

### Childcare Grant (CCG)

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

- complete and return this form **and**
- complete a Grants for Dependants application form for part-time students (PTGFD) **and** an application for help with childcare costs for part-time students form (PTCCG1).

You can download the PTGFD and PTCCG1 form at [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

Tick the box below if you want us to send you a PTGFD and PTCCG1 form instead.

Send me a PTGFD and PTCCG1 form

**If any information we ask for is missing or unclear we may not be able to process your application and you won't receive any funding.**

# 1 Your personal details

## Personal details

1.1 **Customer Reference Number** ⓘ

1.2 Complete these details exactly as stated on your birth certificate or passport.

If your name has changed from your birth certificate or passport then send us supporting evidence confirming the change. ⓘ

Title  Mr  Mrs  Miss  Ms

First name(s)

Surname

Any other names you may be known by

Sex  Male  Female

Date of birth Day   / Month   / Year

1.3 **National Insurance number** ⓘ   -       -

We will share the National Insurance number you provide with the Department for Work and Pensions to confirm that it's valid, and with HM Revenue and Customs to allow us to collect your repayments.

## 1.4 Address details

Contact address

Postcode

All correspondence we issue will be sent to this address. You can update your address at any time by logging into your online account or by calling us.

### 1.4.1 Contact details

Give your current contact details.

Contact phone number

Mobile phone number

Email address

# 1 Your personal details – continued






## 1.5 What language would you like us to use on the letters we send you?

- Welsh
- English

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## 1.6 Relationship status

What is your current relationship status?

- Single
- Living with a partner  
If you're under 25 and have been married/ in a civil partnership before, you should also tick the box for the relevant marital status below.  
- Married/civil partnership  
Give the date of marriage/civil partnership  
Day            Month            Year  
 /  /
- Separated 
- Divorced/dissolved civil partnership 
- Widowed/surviving civil partner 

## 2 About your university or college and course

### 2.1 Will you be getting funding from any other source to meet the costs of your tuition fees in this academic year?

Tell us about any contribution to your tuition fees that may be made by an employer, a bursary scheme, or from any other type of fund or sponsorship. Please note that we do not need to know if you are receiving a Care Leavers Higher Education Bursary.

No

Yes

What is the source of this funding?

How much funding will you receive?

### 2.2 Will you be studying at exactly the same university or college and on exactly the same course that you were in the academic year 2022/23?

No

Yes – go to 2.5

### 2.3 University or college details

If your course is at a university that is made up of a number of colleges, give the name of the college first, followed by the name of the university.

Name

Full address

### 2.3.1 If the course is franchised to another university or college, give the name and address of the other university or college

Name

Full address

### 2.3.2 Give the full name of your course

You should check the name of your course with your university or college. If the course details you give us can't be confirmed yet, your student funding may be delayed. Don't enter your module name here.

### 2.4 Qualification you expect to gain

For example, BA (Hons) English

## 2 About your university or college and course – continued

2.5 In this academic year, when will you start your studies?

Month      Year  
  /

2.6 When will you finish the final year of your course?


Month      Year  
  /


2.7 What year of your studies are you going into?

Make sure you tell us what year of your studies you're going into **not** the year of your course.

2.8 What date did you start your studies?


Month      Year  
  /

2.9 How many credits do you plan to study this academic year? 

2.10 Full tuition fee amount your university or college is charging you this academic year 


£

2.11 Will you be undertaking a placement as part of the Erasmus+ exchange programme, Turing Scheme or International Learning and Exchange (ILE) programme?


No  
 Yes 


2.12 Are you studying a part-time distance learning course?

No – go to section 3  
 Yes

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

No  
 Yes

2.14 Are you studying a distance learning course because you or a family member (who you live with) is currently serving in the Armed Forces outside Wales? 

No  
 Yes – send evidence 

# ! Before you continue...

## What you need to know

Your course intensity must be at least 25% in academic year 2023/24 to be eligible to apply for a Tuition Fee Loan, Welsh Government Learning Grant and/or Maintenance Loan.

## What you need to do

The information below tells you which sections of the form you need to complete.

**If you want to apply for a Tuition Fee Loan only**

Complete sections 3 and 8

**If you want to apply for a Tuition Fee Loan and a Welsh Government Learning Grant and/or Maintenance Loan**

Complete sections 3 to 9

## 3 Your loan request

### 3.1 Tell us the amount of Tuition Fee Loan you want to borrow

Any Tuition Fee Loan you borrow will be paid directly to your university or college.

You want the maximum available to you

If you want less than the maximum available to you tell us how much you want to borrow

£  (enter amount)

### 3.2 Tell us the amount of Maintenance Loan you want to borrow

We'll work out how much Welsh Government Learning Grant you can get first then the rest of your student finance will be awarded as a Maintenance Loan. If you request more Maintenance Loan than you're entitled to, we'll award you the lower amount.

You want the maximum available to you

If you want less than the maximum available to you tell us how much you want to borrow

£  (enter amount)

### 3.3 Contact details

You must give the name and address of at least one contact. If you provide details of two contacts, the people you name should live at different addresses and will only be contacted if, for example, you move address and don't inform us. You must inform these people that you've named them as contacts.

#### Contact 1

First name(s)

Surname

Relationship to you

Address

Postcode

Home phone number

#### Contact 2

First name(s)

Surname

Relationship to you

Address

Postcode

Home phone number





## 4 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.

4.1 Will you be aged 25 or over on the first day of the first academic year of your course?

- No  
 Yes



4.2 Have you been married or in a civil partnership at any time before the first day of the academic year?  

- No  
 Yes

4.3 Will you have care of a person under the age of 18 on the first day of the academic year?  

- No  
 Yes

4.4 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. 
- At any point from the age of 14 to the first day of the first academic year of the course, you have not been under the legal care of your parents for 13 weeks or more, you have been under a special guardianship order or you have been in the custody or legal care of, or have been given accommodation by a Local Authority for 13 weeks or more. 
- Both your parents are deceased.
- You have applied for student finance before, and the parent who provided their income details is deceased.
- Your parents are living outside the UK, Gibraltar or EU and the assessment of their financial circumstances would place them in jeopardy.
- Your parents are living outside the UK, Gibraltar or EU 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 5**

If you have previously been considered independent because you have supported yourself financially for a total of 3 years or more before 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 5**


## 5 Student financial details

If you leave any question 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

5.1 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; and/or
- any other payment received for attending the course.

Please estimate the total taxable **unearned** income, before deductions, that you expect to receive for this academic year. 

£

What is the source of this income?

### Payments from an employer

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

Yes

No – go to 5.3

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

£

5.2.2 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

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

Your child's income includes their income from all sources after Income Tax and National Insurance contributions for tax year 2021-22.

Child's full name	Date of birth  (DD MM YYYY)	Relationship to you	Who will they live with?	Child's income   (£)

# ▶ Your UK bank or building society account details

## 6.1 Account details

Sort code  
 -  -


Account number


Building society roll number (if applicable)

 We'll only use the bank details you provide to pay your Welsh Government Learning Grant and/or Maintenance Loan. Tuition fees will be paid directly to your university or college.

## 7 About your family

Tick one of the following options:

I am a **dependent student** - go to question 7.1. 

I am an **independent student with a partner**, please read and sign the **terms and conditions**  on **pages 13 and 14** and then pass this form to your partner to complete **section 9**.


I am a **single independent student**, go to the **terms and conditions** on **pages 13 and 14**.

**7.1** Which parent do you normally live with, or have more contact with?



Mother  Father

or

Both parents  N/A

**7.2** What is the current relationship status of this parent? 

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

**7.2.1** Have your parents divorced, separated, or been in a civil partnership which has been dissolved since the start of your course?  

- Yes
- No

### What you need to do next

Read and sign the **terms and conditions** on **pages 13 and 14** and then pass this form to your parent(s).

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

The parent(s) you normally live with should complete **section 9**.

If the parent indicated in 7.1 is married, in a civil partnership or living with a partner, their partner must also complete **section 9**.

# Terms and Conditions

These terms and conditions (“terms”) and applicable legislation apply to all of the student finance available to students for the academic year 2023/24.

I understand that I must read the specific terms about the student finance products available because they will affect me if I apply for them at any time in this academic year.

## Loan Contract

1. I confirm I have read and understood these terms and A Guide to Terms and Conditions available at [www.studentfinancewales.co.uk/terms-and-conditions](http://www.studentfinancewales.co.uk/terms-and-conditions)
2. 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 that I may not receive student finance, any support I have had may be withdrawn and I could be prosecuted.
3. I understand that student finance is provided to me by the Welsh Ministers (the “Lender”) which includes any persons acting on their behalf and any replacement(s) under section 23(4) of the Teaching and Higher Education Act 1998 as amended or replaced from time to time (the “Act”).
4. I understand these terms, the Act and the regulations made under section 22 of the Act will apply to any student finance provided to me by the Lender.
5. I understand that “student finance” in these terms means financial support by way of grant(s) and/or loan(s) made by the Lender under the regulations.
6. I understand that the Student Loans Company Limited (“SLC”) carries out certain functions on behalf of the Lender.

## My Obligations

7. I understand that if I have:
  - (i) reached the age of 18 years; and
  - (ii) have entered into agreement(s) for a loan under section 22 of the Act before I reached the age of 18 years,I am agreeing to “ratify” any and all such student loans by signing these terms. This means that I confirm I entered into agreement(s) with the Lender and agree to the terms of any such previous agreement(s). If I have reached the age of 18 and refuse to “ratify” any previous agreement(s), I understand that I will not be eligible to get any further student finance under the regulations.
8. I agree to give SLC any information they need in support of this application for student finance and/or to seek repayment.
9. I agree to tell SLC immediately if my circumstances change in any way that might affect my entitlement to student finance. I understand that if I do not do this I may not get any further payments and I may have to repay the student finance I have already received. I agree that from the date I submit my student finance application until my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I must tell SLC about any changes in my personal details (including my National Insurance number) and contact details I have provided.
10. I agree that if I get an overpayment of student finance, I need to repay this in full and that any overpayment may be taken from any future entitlement to student finance.

11. I agree that I will repay the Lender any loan(s), together with all and any interest, penalties and charges which apply. I understand that this repayment will be due by me to the Lender as a debt. If I breach any of the terms of my loan, I agree to pay any charges and penalties which apply under the Act and the regulations. I understand that I will repay my loan(s) through the United Kingdom (“UK”) tax system and/or I may repay SLC directly. If I live abroad, I will repay my loan(s) to SLC directly.
12. I agree that any loan(s) made to me in accordance with the regulations once my application is accepted by the Lender is a/are contract(s) between me and the Lender. I understand that I am liable for my loan(s) and will be charged interest from the first payment of the loan advance by the Lender.
13. I agree to tell SLC if I leave the UK to live outside the UK or if for any other reason I am outside the UK tax system for more than three months.

## Legal Action and Applicable Law

14. In the event of any legal action, I agree that the laws of England and Wales will apply and that the courts of that part of the UK will hear any legal action. If my address is outside the UK the laws of the part of the UK where my education provider is situated will apply and the courts of that part of the UK will hear any legal action. I agree that the Lender has the right to take legal action against me in any other court with jurisdiction.

## Sharing Information

15. If I am in breach of these terms and/or the regulations I agree that the Lender may share information held about me and my account with third parties, including the government or a government agency of another country, who may help to locate me and/or help take action to recover any payments I owe.
16. I confirm where I have provided any personal information about any other person in my student finance application, I have done so with their consent.
17. I understand that SLC will process my personal data in line with the Privacy Notice available at [www.studentfinancewales.co.uk/privacy-notice](http://www.studentfinancewales.co.uk/privacy-notice) which may be updated from time to time.

## Disabled Students’ Allowance (“DSA”)

This section applies if I apply for DSA this academic year.

18. I understand that any equipment I receive through DSA must be used for my course of study and that I am responsible for paying any repair costs.
19. I understand that if I consent to SLC sourcing my equipment and support, SLC can pay the suppliers of any approved equipment and support directly.
20. I understand that with my consent, SLC can make payment to the needs assessment centre on my behalf.
21. I understand that with my consent, SLC can make a direct payment on my behalf to third parties providing any other approved service or support to me.
22. If I do not agree to SLC paying the suppliers of equipment, support or other services on my behalf, I understand that I will be responsible for meeting the costs of any approved equipment, support or other services out of my DSA allowance. SLC reserves the right to request evidence of receipt of equipment, support or other services in relation to my DSA.

**Childcare Grant (“CCG”)**

This section applies if I apply for CCG this academic year.

- 23. understand that if I do not provide the evidence of childcare costs within the timescales set, I may lose my entitlement. If my childcare costs are different from the estimates I have provided, further payments of my CCG may increase or decrease accordingly. If no further CCG payments are due to be paid to me, I may be liable to repay any difference.
- 24. 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.

- 25. I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from:
  - (i) the childcare element of Working Tax Credit;
  - (ii) the childcare element of Universal Credit;
  - (iii) Tax-Free Childcare; and/or
  - (iv) the NHS Bursary Childcare Allowance;and I agree to tell SLC immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that SLC may share my personal data with HMRC to check whether I get childcare support.

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

Day                      Month                      Year  
  /   /

### 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 the partner of an independent student

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

### Use the supporting notes to prevent any delays to the application



Where you see this icon it means there's additional information in the Supporting Notes which will help you complete your supporting application.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

Read the notes – if you don't answer a question or section correctly or you don't include the documents we need this will delay the students application.

### What details do I need to provide?

You need to provide:

- your personal details, such as your name and address;
- your National Insurance (NI) number (if you have one);
- details of any income from the UK or overseas for tax year 2021-22 that HM Revenue and Customs (HMRC) doesn't know about;
- details of any pension payments you made for the tax year 2021-22; and
- details of any other dependants.

### Why do I need to tell you my income from the 2021-22 tax year?

We use figures from this tax year because it is the most up-to-date information that HMRC holds for you.

You must tell us your 2021-22 income details as we cannot accept amounts from any other tax year. This ensures the student(s) you're supporting receives everything they're entitled to.

### What happens if my household income has dropped since tax year 2021-22?

If your household income is expected to or has dropped by at least 15% since tax year 2021-22, you can apply for a current year income assessment. This means we'd assess the student for funding based on your estimated income for tax year 2023-24.

You must still complete this form but can provide a more up to date income figure later to ensure the student gets paid the right amount. Read page 27 of the supporting notes for information on how to apply for a current year income assessment.

### Additional information

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

#### If you have further questions you can:

- check out the supporting notes
- visit [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

**Part A – Your personal details**

**Person 1**

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)




Surname

Any previous names you may be known by

Sex

Male  Female

What is your current marital status?

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

Preferred correspondence language

Welsh  English

**Person 2**

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)




Surname

Any previous names you may be known by

Sex

Male  Female

What is your current marital status?

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

Preferred correspondence language

Welsh  English



## 9 Financial details for tax year 2021-22 for parents and partners

Date of birth   /   /

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

Contact address

Postcode

Contact telephone number

Email address

Date of birth   /   /

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

Contact address

Postcode

Contact 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 form (PFF2) 2023/24 from: [www.studentfinancewales.co.uk](http://www.studentfinancewales.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


**Person 2**

Send me a separate form

# 9 Financial details for tax year 2021-22 for parents and partners

## Part B – Data sharing and you

If you have a National Insurance (NI) number you must provide it below. We will use your NI number to check your income for the 2021-22 tax year with HM Revenue & Customs. This allows us to gain the most accurate financial information.

If you do not have an NI number then we will need full evidence of your financial details for the 2021-22 tax year. 

	Person 1	Person 2
Q1 Do you have an NI number?	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Q6 <input type="checkbox"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Q6 <input type="checkbox"/>
Provide your NI number:	<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"/> <input type="text"/> go to Q2	<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"/> <input type="text"/> go to Q2
Q2 Did you complete a self assessment tax return in the UK for the tax year 2021-22?	<input type="checkbox"/> Yes - go to Q3 <input type="checkbox"/> No - go to Q5	<input type="checkbox"/> Yes - go to Q3 <input type="checkbox"/> No - go to Q5
Q3 Did you receive any UK income that was under a tax threshold?	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Q4	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Q4
Q4 Did you receive any income in tax year 2021-22 from overseas that wasn't declared to HMRC?	<input type="checkbox"/> Yes - go to Part D <input type="checkbox"/> No - go to Part E	<input type="checkbox"/> Yes - go to Part D <input type="checkbox"/> No - go to Part E
Q5 HMRC will tell us any income you received in the UK from employment, benefits and/or pensions. Did you receive any other income?	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Part E	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Part E
Q6 Did you have any income during the 2021-22 tax year?	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Part E	<input type="checkbox"/> Yes - go to Part C <input type="checkbox"/> No - go to Part E

# 9 Financial details for tax year 2021-22 for parents and partners

## Part C – Other income in the UK

### Instructions

- Please give your financial details for the tax year from **6 April 2021 to 5 April 2022**.
- Answer 'Yes' or 'No' to question Q1, if you answer 'Yes' please provide the income amount.
- If you answer 'No' to question Q1, this means you are telling us that you **did not** receive any income from that particular income type in tax year 2021-22.



**Although you may not have declared income to HMRC as it was below the taxable threshold, this needs to be declared and will be used when calculating the student's entitlement.**

### Financial details

**Q1** Did you receive any income in the UK that HMRC doesn't know about? 

Person 1

Yes  No - go to Q2

Person 2

Yes  No - go to Q2

**a** Total income from savings and investments  
Only tell us about the amount of interest/income you gained from savings and investments during the 2021-22 tax year, not the actual amount of savings or invested sums you had.

£

£

**b** Total income from property lettings, land or rent  
This includes the Rent a Room Scheme.

£

£

**c** Total income from casual/freelance earning(s)  
This includes any supplementary sources of income.

£

£

**Q2** Did you receive any income from overseas that you haven't already told HMRC about?

Yes - go to Part D  
 No - go to Part E

Yes - go to Part D  
 No - go to Part E

# 9 Financial details for tax year 2021-22 for parents and partners

## Part D – Overseas income for tax year 2021-22

### Instructions

- Please give your financial details for the tax year from **6 April 2021** to **5 April 2022**.
- Please enter your income in the currency you were paid in, you don't need to convert it.



**You will need to send us evidence of any income declared in this section as HMRC are unaware of it.**

### Financial details

**Q1** Did you receive any income from overseas from the following sources: ⓘ

Person 1

No - go to Part E

Yes

Person 2

No - go to Part E

Yes

**a** Income from employment or self-employment

If you have already informed HMRC of this income, you should not state it here.

**b** Income from taxable state benefits

**c** Income from occupational, private pension(s)

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

**d** Any other income

Examples of this includes income from:

- savings and investments;
- property lettings, land or rent; or
- casual freelance earnings.

This is not an exhaustive list, you may have other income.

**e** Total overseas income that HMRC doesn't know about?

Please total the amounts declared in questions a to d to provide an overall amount.

**Q2** If your income in Q1 was not paid in pounds sterling, what currency was this paid in?

# 9 Financial details for tax year 2021-22 for parents and partners

## Part E – Income deductions

### Instructions

- Please give your financial details for the tax year from **6 April 2021** to **5 April 2022**.
- Answer 'Yes' or 'No' to questions Q1 and Q2, if you answer 'Yes' please provide the income amount.



**Any deductions declared in section 5 will reduce your household income figure when calculating the student(s) entitlement (as long as evidence is provided).**

	Person 1	Person 2
<b>Q1</b> Did you pay any private pension contributions? ⓘ	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Q2	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Q2
Total amount you paid	£ <input type="text"/>	£ <input type="text"/>
<b>Q2</b> Did you pay any Additional Voluntary Contributions (AVCs)? ⓘ	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Part F	<input type="checkbox"/> Yes <input type="checkbox"/> No - go to Part F
Total amount you paid	£ <input type="text"/>	£ <input type="text"/>

## Part F – Your dependants – not in further or higher education

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 2023/24 ⓘ

Do not include any dependants in further or higher education in Q1. Their details should be put into Q2. Include unearned income for all dependants.

If you have more than 2 children and need more space use the additional notes section on page 26.

Full name	<input type="text"/>	Full name	<input type="text"/>
Date of birth (DDMMYYYY)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Date of birth (DDMMYYYY)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Income for the year	<input type="text"/>	Income for the year	<input type="text"/>

## 9 Financial details for tax year 2021-22 for parents and partners

### Q2 Child dependants in further or higher education in academic year 2023/24

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

If the student is your partner, please include any children they named in their application for student finance if the children have applied for student finance.

If you have more than 2 children and need more space use the additional notes section on page 26.

Full name

Date of birth (DDMMYYYY)

School, college or university

Course

Are they receiving financial support? If so, from which authority or organisation?

Do you want to support this student's application for student finance?

 Yes  No

Full name

Date of birth (DDMMYYYY)

School, college or university

Course

Are they receiving financial support? If so, from which authority or organisation?

Do you want to support this student's application for student finance?

 Yes  No

## Declaration for parents and partners

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 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 Student Loans Company Ltd 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

Today's date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Person 2

Your full name (in BLOCK CAPITALS)

Your signature

Today's date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Returning the form

To make sure the student receives their first payment at the start of term, this form **should** be returned with all of the evidence we need as soon as possible. If the application form is returned more than nine months after the start of the academic year it won't be processed, and the student may lose their full entitlement to student finance for this academic year.



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

## 10 Voluntary questions

The following questions are voluntary – you do not have to answer them. Whether or not you answer will not affect our assessment of your entitlement to financial support.

If you answer the following questions, the information will be used to help the Welsh Ministers develop their policies in the future.

**Q1 Do any of your parents have any higher education qualifications, for example, degrees and diplomas or certificates of higher education?**

This includes your natural parents, your adoptive parents, your step-parents, partners of your parents, and your guardians.

- No
- Yes
- Don't know

**Q2 How would you describe your ethnic origin?**

**White**

- British
- Irish
- Any other white background

**Black or Black British**

- African
- Caribbean
- Any other black background

**Mixed**

- White and black Caribbean
- White and black African
- White and Asian
- Any other mixed background

**Chinese or other ethnic group**

- Chinese
- Any other

**Asian or Asian British**

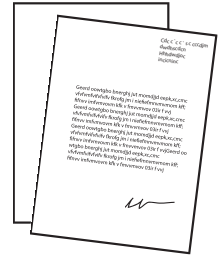
- Indian
- Pakistani
- Bangladeshi
- Any other Asian background



Before you send your form make sure you've:

**Included all documents we've asked for to support your application**

If we don't receive all the information we need your application will be delayed.



**Read, signed and dated the terms and conditions on [pages 13 and 14](#)**

If you don't sign the terms and conditions we can't give you a loan and/or grant.



Return your completed form to  
**Student Finance Wales**  
**PO Box 211**  
**Llandudno Junction**  
**LL30 9FU**

Make sure that your completed application and all evidence are weighed and the postage costs are fully paid.

**Remember to ask for proof of postage!**

**Additional notes**

# Give permission for someone to contact us on your behalf

If you'd like to give permission for a nominated person to talk to us about your account, you can use this form to set up Consent to Share (CTS) for them.

A nominated person could be:

- an individual person such as your parent, foster parent, sibling or partner; or
- a university/college advisor or a third party advisor. A third party advisor could be a social worker, personal advisor or charity advisor (from organisations such as WeBelong, Become or StandAlone).

## What your nominated person needs to know

When they call us, they'll need to pass our security authentication using the details you provide on this form. They'll be able to discuss and ask for:

- any information about your account, except for your bank details
- the status of your application and any evidence that we need
- correspondence you've been sent or request forms for you

## What do I need to do?

**Section A** - Complete this if you want to give permission to an individual person.

**Section B** - Complete this if you want to give permission to a university/college advisor or a third party advisor.

You can set up CTS for both an individual person and an advisor using the same access code.

If any of the details on this form are left out, we can't set up CTS.

Once you complete this form, please return it with your application form.

## Is there a way to allow a third party to make updates to my account?

You can give Power of Attorney (PoA) to a third party. A PoA is an official document where you can appoint an attorney allowing them to release or update information relating to your account. A PoA must contain the specific period for which the third party can act as an attorney, and the specific tasks they can perform. You can still complete the sections of the form below and send us a copy of the PoA document. As above, the person holding PoA must pass our security authentication.

## I've changed my mind and no longer wish to give permission. What should I do?

You can remove your permission at any time. To do this, call us on **0300 200 4050** or write to us at:

**Student Loans Company Limited**  
**100 Bothwell Street**  
**Glasgow**  
**G2 7JD**

Once you tell us that you want to remove your permission, your nominated person won't be able to access your account information.

## Section A - Permission for an individual person

Provide the details of the individual person. When they call, they'll need to confirm your full name, customer reference number and these details that you're providing before accessing your account.

Forename

Surname

Date of birth (DDMMYYYY)

  /   /    

Relationship to you

Access code/Password  
(this should be different from the password  
you use to sign into your account)

Contact address

Postcode

Date you want permission to be active from

  /   /   

Date you want permission to end (this can be  
updated/extended at any time).

  /   /

## Section B - Permission for university or third party advisor

Provide the details of the university or third party advisor. When they call, they'll need to confirm your full name, customer reference number and these details that you're providing before accessing your account.

### Advisor details

Advisor forename

Advisor surname

Organisation name

Department

Job title

### Access details

Access code/Password  
(this should be different from the password you use to sign into your account)

Date you want permission to be active from

/ / 

Date you want permission to end (this can be updated/extended at any time).

/ / 

## Student Declaration

I agree that the Student Loans Company Limited can exchange information about my student finance account with the person named.

I confirm where I have provided any personal information in relation to a third party, I have informed them of this.

Your customer reference number

Your full name (in BLOCK CAPITALS)

Your signature (in ink)

Today's date (DDMMYYYY)

/ /