

cyllid myfyrwyr cymru student finance wales



Yes

No

Current Year Income Assessment Form

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.

Before you complete this form

For the student to be assessed based on your estimated income for the tax year 2024-25 we need to be able to compare your estimated income with your actual income for tax year 2022-23.

Person 1 Person 2

Have you told us your financial details for tax year 2022-23?

Yes No

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 2024-25 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
Day Month Year Date of birth / / / / / / / / / / / / / / / / / / /	Day Month Year 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 2024-25

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 2024 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2025.
- 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.

Person 1 Person 2 No Q1 Do you expect to receive any income from salary, Yes No Yes 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.

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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

Q2 Do you expect to receive any income from a State **Retirement Pension?**

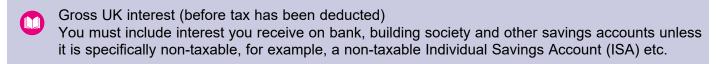
- a Total expected non-lump sum amount
- **b** Total expected lump sum amount

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

Q3 Do you expect to receive any income from savings and investments?

- 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

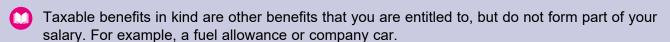
ı	Yes	No	ı	Yes	No
£			£		
£			£		
£			£		
£			£		



Q4 Do you expect to receive any income from taxable benefits in kind?

Total expected income from taxable benefits in kind

ı	Yes	No	Yes	No
£			£	



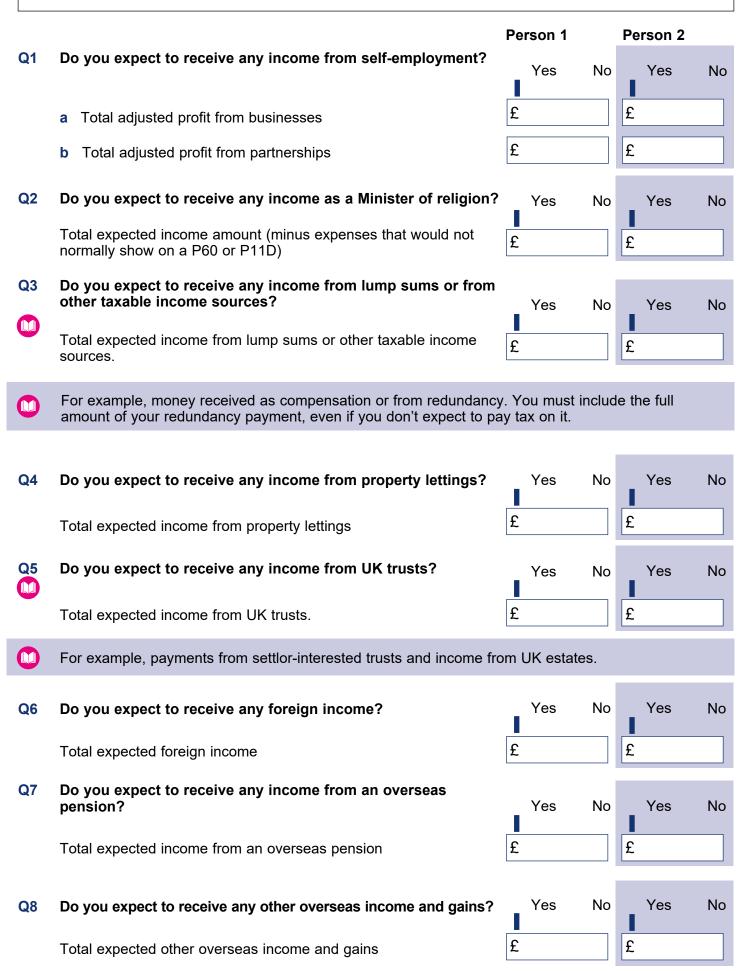
Q5 Do you expect to receive any other income during the 2023-24 tax year that you haven't yet told us about?

Yes – go	Yes – go to
to Part B	Part B
No – go to	No – go to
Part C	Part C

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Section 2 Financial information - continued

Part B Other income



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Section 2 Financial information - continued

Part C Income deductions

Q1 Do you expect to pay any private pension contributions?

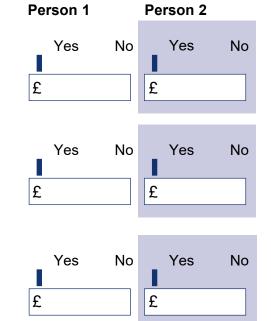
Total expected private pension contributions

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

Total expected AVCs

Q3 Do you expect to have any allowable expenses on which you will claim tax relief?

Total expected allowable expenses on which you will claim tax relief



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

Your full name (in BLOCK CAPITALS) Your signature Day Month Year Date

Your full name (in BLOCK CAPITALS)		
Your signature		
Day Month Year Date / / / / / / / / / / / / / / / / / / /		

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