

# Application for Student Finance for continuing students **2015/16**



You can also apply online at [www.studentfinanceneni.co.uk](http://www.studentfinanceneni.co.uk)

Your forename(s)

Your surname

You should complete this form if you are continuing study on one of the following courses:

- A full-time or sandwich course of higher education
- A full-time Initial Teacher Training (ITT) course
- A part-time ITT course
- A flexible ITT course that lasts at least six weeks
- A diploma or degree course in a health related discipline and you are eligible to apply for an **income assessed** bursary from the National Health Service (NHS) or the Department of Health, Social Services and Public Safety (DHSSPS) or the Student Awards Agency for Scotland (SAAS).

**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 can be found in the guidance notes.



## **Deadline**

To make sure you receive your first payment at the start of term, you **must** return this form and all of the evidence we need by **30 June 2015**. We will do our best to process your application as soon as possible, however if the deadline date has passed, your first payment may not be ready for the start of term.

If your application form is returned more than 9 months from the start of your academic year it won't be processed, and you may lose your full entitlement to student finance.

# 1

## finance available

**All students can apply for the following student finance by completing this form:** 

- Maintenance Loan
- Tuition Fee Loan
- Parents' Learning Allowance
- Adult Dependents' Grant
- Travel Grant
- Disabled Students' Allowances
- Childcare Grant

**If you started your course in academic year 2006/07 or after** (not including gap year students who started in 2006/07) you can also apply for: 

- Maintenance Grant
- Special Support Grant
- Bursaries and Scholarships

**If you started your course in academic year 2005/06 or before** (this would include gap year students who started in 2006/07) you can also apply for: 

- Grant for Tuition Fees
- Higher Education Bursary

You can find more detailed information on what is available and what you might be entitled to at **[www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**

### What if I have questions?

If you have questions you can:

- visit **[www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**
- read 'A guide to financial support for full time students in higher education 2015/16'
- call us on **0300 100 0077**. Our opening hours are Monday to Friday 8.00am to 8.00pm and Saturday and Sunday 9.00am to 4.00pm.

### Where do I send my form?

You must return your completed form to the Education and Library Board (ELB) address which can be found on the ELB finder available online at **[www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**



**Remember to pay the correct postage or we may not receive your form.**

## finance available

### You can apply in 5 easy steps

Depending on your circumstances you may not need to complete all of the steps.

<b>Step 1</b>	<p><b>For all students</b></p> <ul style="list-style-type: none"> <li>• Complete sections 2-4.</li> <li>• Remember if you are applying for a loan you need to tell us how much you want by completing the loan request section on page 9.</li> <li>• You do <b>not</b> need to complete section 4 if you are <b>only</b> applying for a Tuition Fee Loan.</li> </ul>
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If you **only** want to apply for a Tuition Fee Loan or a Maintenance Loan not based on household income you can go to **Step 5**.

<b>Step 2</b>	<p><b>For students who want student finance based on household income</b></p> <ul style="list-style-type: none"> <li>• Complete sections 5 and 6.</li> <li>• If you think you qualify for Special Support Grant, please tick this box. <input type="checkbox"/> Tick</li> </ul> <p>Detailed information about who can qualify for Special Support Grant and what evidence needs to be provided can be found in the notes.  </p>
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<b>Step 3</b>	<p><b>For students who have dependants</b></p> <ul style="list-style-type: none"> <li>• Complete section 7.</li> <li>• You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.</li> </ul>
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If you are a single independent student go to **Step 5**.

<b>Step 4</b>	<p><b>For students who want student finance based on household income</b></p> <ul style="list-style-type: none"> <li>• Complete section 8.</li> <li>• Depending on your answers in section 8 you may need to ask your <b>parent(s) or partner</b> to provide details about their income in section 9 so we can work out what your full entitlement to student finance will be.</li> <li>• If you do not wish to apply for student finance based on household income, your parent(s) or partner do not need to complete section 9.</li> </ul>
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<b>Step 5</b>	<p><b>For all students</b></p> <ul style="list-style-type: none"> <li>• Make sure that you read and sign the <b>Student Declaration on pages 15 and 16</b>. If you asked someone to complete section 9, make sure that they have signed <b>their declaration(s) on page 25</b>.</li> </ul>
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### Other student finance available

#### Childcare Grant (CCG)

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

- complete and return this form **and**
- complete an Application For Help With Childcare Costs (CCG1).

You can download the CCG1 form at:

**[www.studentfinancenico.uk](http://www.studentfinancenico.uk)**

Tick the box below if you want us to send you a CCG1 form instead.

Send me a CCG1 form:  Tick

#### Disabled Students' Allowances (DSAs)

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

- complete and return this form and
- complete a Disabled Students' Allowances Application Form (DSA).

You can download the DSA form at: SFE/PR1F/1011

**[www.studentfinancenico.uk](http://www.studentfinancenico.uk)**

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

Send me a DSA form:  Tick

# 2

## personal details

Customer Reference Number (if you have one)

### Personal details

a

Title Mr  Mrs  Miss  Ms

Forename(s)

Surname

Sex Male  Female

Date of birth DAY MONTH YEAR

### Contact details

b

Please give your current home address. If you know it, please also give your term-time address. 

#### Home address

  
  


Postcode

Home phone number

Mobile phone number

Email address

#### Term-time address

  
  


Postcode

Date you'll move to this address

DAY MONTH YEAR

### Current relationship status

c

Tick one box below to show your status. Only send evidence if this has changed since your last application.

Single

Living with a partner 

Married/civil partnership 

Separated 

Divorced/dissolved civil partnership 

Widowed/surviving civil partner 

Please give the date of marriage/civil partnership

DAY MONTH YEAR       

## about your course and your university or college

- a** Full tuition fee amount for academic year 2015/16 £
- Please remember your tuition fee amount can change each academic year. If you are unsure about the tuition fee amount you'll be charged, speak to your university or college.
- b** Is this the final year of your course? Yes  No
- c** Will you be studying at exactly the same university or college and on exactly the same course that you were in academic year 2014/15? Yes  No  if 'Yes' go to e2

If any of your course or university or college details have changed **in any way** since you applied for student finance last academic year, you must complete all the questions in this section with the **new** details.

### University or college details

- d** University or college name and address

Postcode

UCAS personal identification number

UCAS university or college code

UCAS campus code (if applicable)

### Course details

- e1** Course name

If you are following a combined studies or modular course, please list all subjects being studied

UCAS course code

Qualification you expect to gain (for example, BSc Physics)

Course start date MONTH YEAR

Course end date MONTH YEAR

Course length (years)

about your course and your university or college

e2

- Year of course  Foundation  Third year  
 First year  Fourth year  
 Second year Other (give details)

If the course is franchised to another university or college, give their address below


 Postcode 

f

**Course type (please tick one box):**

Full-time undergraduate

**Initial Teacher Training (ITT) courses**

Flexible postgraduate ITT

Part-time undergraduate ITT

Part-time ITT  n  
(excluding first degrees)

Full-time postgraduate ITT

**Other course types**

Full-time distance learning

Full-time foundation degree

Full-time involving a placement  
(sandwich course)

**Answer both questions**

Number of weeks you will be studying full-time in academic year 2015/16.

Number of weeks you will be on full-time teaching practice in academic year 2015/16.

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

Yes  No   e

g1

In academic year 2015/16, are you eligible to apply for a bursary, excluding social work bursary from any of the following?  n

- National Health Service (NHS)
- Department of Health, Social Services and Public Safety (DHSSPS)
- Student Awards Agency for Scotland (SAAS)

Yes  No

g2

If 'Yes', is this bursary:  n

Income assessed   
 Non-income assessed

about your course and your university or college

**Term details**

**h** Where will you live during academic year 2015/16?

Term 1	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>
Term 2	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>
Term 3	Living with parent(s) <input type="checkbox"/>	Elsewhere or own home <input type="checkbox"/>

**i** Where will you spend most of your time in academic year 2015/16?

Term 1	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/>	Work placement <input type="checkbox"/>
Term 2	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/>	Work placement <input type="checkbox"/>
Term 3	University or college <input type="checkbox"/>	Study abroad <input type="checkbox"/>	Work placement <input type="checkbox"/>

if you have ticked 'University or college' for all 3 terms go to section 4

**j** Have you been accepted onto the Erasmus exchange scheme? Yes  No

if 'Yes' and/or you'll be studying abroad go to section 4

**Placement details**

**k** Where will your placement be?

Abroad  UK/ROI  Don't know

Placement name and address

 Postcode 

Is the placement:

paid  
 unpaid

If 'unpaid', please tick which type:

a hospital, Public Health Service Laboratory or with a Primary Care Trust;  
 a Health Authority, Strategic Health Authority, Local Health Board, Special Health Authority, Health Board, Special Health Board or a Health and Social Services Board;  
 a Local Authority carrying out its duties relating to health, welfare or caring for children and young people, a voluntary organisation providing facilities or carrying out similar activities;  
 the prison or probation sector or after-care services;  
 unpaid research in a UK/ROI or overseas institution; or  
 an unpaid placement that is not listed above.

section

# 4

## your UK bank or building society account details

**This account must be in your own name and be able to accept direct credits.**

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan.

Please note that missing or incorrect bank or building society details will result in your Maintenance Loan, bursary (if applicable) or any grant payments being delayed.

You can update your bank details at any time by logging into your student finance account at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)

Sort code

 -  - 

Account number

Building society roll number (if applicable)

# loan request section

If you are applying for a Maintenance Loan, a Tuition Fee Loan or Student Contribution Loan, please complete this section to tell us how much you want to apply for.

National Insurance number    -       -

## Maintenance Loan

Amount of Maintenance Loan you would like to apply for:  **Tick** Maximum available to you  
If you wish to apply for less than the maximum available to you, please state the amount  £

## Tuition Fee Loan

Your tuition fee is set by the university or college you go to. You can apply for a Tuition Fee Loan to cover your fees. This will be paid directly to your university or college.  
Amount of Tuition Fee Loan you would like to apply for:  **Tick** Maximum available to you  
If you wish to apply for less than the maximum available to you, please state the amount  £

## Student Contribution Loan

Amount of Student Contribution Loan you would like to apply for:  **Tick** Maximum available to you  
If you wish to apply for less than the maximum available to you, please state the amount  £

### Contact details

We need you to give the name and address of two additional contacts. We'll only contact them if we can't get in touch with you, for example if you move address and forget to tell us. By entering these details, you're confirming you've told your additional contacts about this and they're happy for Student Loans Company to contact them if necessary.

#### Contact 1

#### Contact 2 (Contact 2 must live at a different address from Contact 1)

Forename(s)	Forename(s)
Surname	Surname
Relationship to you	Relationship to you
Address	Address
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
Postcode	Postcode
Country	Country
Phone number	Phone number

# 5

## 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.**

**a1** Will you be 25 or over on the first day of the academic year? Yes  No

if 'Yes', you are an independent student, **go to section 6**

**a2** Have you been married or in a civil partnership at any time before the first day of the academic year? Yes  No

if 'Yes', you are an independent student, **go to section 6**

**a3** Will you have care of a person under the age of 18 on the first day of academic year 2015/16?  Yes  No

if 'Yes', you may be considered an independent student, **go to section 6**

If you have previously been considered independent because you have supported yourself financially for a total of 3 years or more prior to 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 6**

**b** 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 16 to the start of your course, you have not been under the legal care of your parents; and, for three months or more, you have been in the custody or legal care of, or have been given accommodation by, a local authority. 
- Both your parents have died.
- You have applied for student finance before, and the parent who was assessed for a contribution has died.
- Your parents are living outside the European Union and the assessment of their financial circumstances would place them in jeopardy.
- Your parents are living outside the European Union and it would not be reasonably practicable or possible for them to send you money.

**If you've ticked any of the boxes above, you will be contacted for evidence if your situation has changed since last year and subject to this, you may be considered independent.**

**If you haven't ticked any of the boxes above you're a dependent student.**

## student financial questions

If you leave any questions 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

**a** 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
- Any other payment received for attending the course

Please estimate the total taxable unearned income, before deductions, that you expect to receive in academic year 2015/16.  £

What is the source of this income?

### Payments from an employer

**b1** Will your employer be releasing you to attend your course for academic year 2015/16?

Yes  No  if 'No' go to **c**

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

£

**b2** During academic year 2015/16, 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

**c** Give details of any children who will be wholly or mainly financially dependent on you during academic year 2015/16.

Your child's income should include their income from all sources for tax year 2013-14 after Income Tax and social security contributions.

Child's full name	Date of birth <input type="text" value="e"/>	Relationship to you	Who will they live with?	Child's income <input type="text" value="n"/> <input type="text" value="e"/>
	(DD MM YYYY)			(£)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# 7

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

**Only complete this section if you want to apply for Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant.** n

**a** Are you a lone parent? Yes  No  if 'Yes' go to d

**b** Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance? Yes  No  if 'No' go to d

**c** Give the total estimated income after Income Tax and National Insurance deductions in academic year 2015/16 for: n

You £  Your partner £

How much of this will be Child Tax Credit for academic year 2015/16?

You £  Your partner £

**Only answer this question if you are applying for Childcare Grant.**

**d** During the academic year, do you or your partner expect to receive:

- the childcare element of Working Tax Credit; or
- Tax-Free Childcare from HM Revenue and Customs (HMRC); or
- Childcare Allowance from the NHS

Yes  No

**!** If 'Yes', you can't get Childcare Grant and receive childcare support from one of these sources at the same time. You can still apply for Childcare Grant however, you'll only get it if you stop receiving support from these sources. n

**e1** Are you applying for Adult Dependants' Grant? Yes  No  if 'No' go to f

**e2** Who is your adult dependant?

husband,  
wife,  
civil partner  
or partner (if you are over 25)  go to f

other adult dependant  go to e3

**e3** Will your other adult dependant's income be more than £3,873 for academic year 2015/16? Yes  No

**!** If 'Yes' you will not be able to apply for Adult Dependants' Grant

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

**e4** Give your other adult dependant's income for tax year 2013-14

### Income

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

All pensions (including private, occupational and state)

All gross taxable income and interest from savings, investments and dividends

Taxable state benefits

All other taxable income

### Deductions

Private Pension contributions and Additional Voluntary contributions (AVCs)

Allowable expenses on which you claimed tax relief

**Only complete this question if you started your course in or before academic year 2013/14.**

**f** Give details of financial commitments which you, the student, were paying before the start of the course and that you, your husband, wife or partner will continue to pay for during academic year 2015/16.

Please enter the annual amount.

Type	<input type="text"/>	£	<input type="text"/>	Type	<input type="text"/>	£	<input type="text"/>
Type	<input type="text"/>	£	<input type="text"/>	Type	<input type="text"/>	£	<input type="text"/>
Type	<input type="text"/>	£	<input type="text"/>	Type	<input type="text"/>	£	<input type="text"/>
Type	<input type="text"/>	£	<input type="text"/>	Type	<input type="text"/>	£	<input type="text"/>

# 8

## about your family

If you are a **dependent student**, go to **question a**.

If you are an **independent student with a partner**, go to the **Student Declaration** on **pages 15 and 16** and then pass this form to your partner to complete **section 9**.

If you are a **single independent student**, go to the **Student Declaration** on **pages 15 and 16**.

**a** With which parent do you normally live, or have more contact?

Mother       Father

or

Both       N/A



**b** What is the relationship status of this parent at the time of applying?

Single 

Living with a partner

Married/civil partnership

Separated

Divorced/dissolved civil partnership

Widowed/surviving civil partner

**c** Have your parents divorced, separated or been in a civil partnership which has been dissolved, since 1 September 2014? 

Yes       No

Now please read and sign the **Student Declaration** on **pages 15 and 16** and then pass this form to the person(s) who you have indicated in 'question a' to complete **section 9**.

### What you need to do next

Read and sign the **Student Declaration** on **pages 15 and 16** and then pass this form to your parent(s).

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

The parent(s) you normally live with should complete **section 9**. If the parent indicated in 'a' is married, in a civil partnership or living with a partner, their partner must also complete **section 9**.

# Student Declaration

Before signing and returning your completed form, you should read the Data Protection statement in the accompanying notes. 

This declaration covers all of the student finance available to students for academic year 2015/16.

By signing this declaration you are confirming that you have read the specific terms and conditions about loans, Childcare Grant and Disabled Students' Allowances because they will affect you if you apply for them at any time in academic year 2015/16. If you don't apply for these in academic year 2015/16 their specific terms and conditions will not affect you.

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

## General 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 I may not receive financial support, any support I have had may be withdrawn and I could be prosecuted.
- I agree to give my ELB any information they require to process my application and agree to tell them immediately if my circumstances change in any way that might affect my entitlement to financial support. I understand that if I do not do this, I may not receive any further payments, and may have to repay the financial support I have already received.
- I agree that in the event of receiving an overpayment of financial support, I am obligated to repay this in full and I agree that such overpayment may be recovered by deduction from any future entitlement to financial support.

## Loan Contract

- a** I have read and understood the booklet 'Student Loans: A guide to terms and conditions' available online at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)
- b** I acknowledge and agree that any loan(s) made to me by the Department for Employment and Learning, 'the lender' (which includes any person exercising functions on behalf of the Department for Employment and Learning pursuant to Article 4 (3) of the Education (Student Support) (Northern Ireland) Order 1998 as amended from time to time or successor legislation, 'the Order') will be on the terms set out in the Loan Request Form including these declarations and in Regulations which are made under Article 3 of the Order as amended from time to time.
- c** I acknowledge and agree that in the event that

I have: (i) reached the age of 18 years; and (ii) have entered into one or more agreements for a loan under section 22 of the Teaching and Higher Education Act 1998 (and relative secondary legislation) before I reached the age of 18 years, upon signing this declaration I am agreeing to ratify any and all such student loans. I understand that ratification of any agreement for a loan made with me before I reached the age of 18 years is a statutory precondition of my eligibility for student support after attaining the age of 18 years.

- d** I undertake to repay the lender any loan(s) made to me, together with all and any interest, penalties and charges which apply.
- e** I agree that any loan(s) made to me as a consequence of the acceptance of my application by the lender is a/are contract(s) between me and the lender which binds me from the payment to me of the first loan advance and that the repayment of any such loan(s), together with all and any interest, penalties and charges which apply, will be due by me to the lender as a debt.
- f** I agree that I shall be obliged to make repayment of my loan(s), together with all and any interest, penalties and charges which apply, to such address as shall be notified to me in writing and that any services in respect of my loan(s) may be provided at such address or other address(es) as the lender may from time to time determine and that the service of providing the loan is provided at the lender's principal address.
- g** I agree that any action for repayment and/or in respect of or in connection with my loan(s) and/or all and any interest, penalties and charges which apply, will be brought before the ordinary civil courts and shall be governed by the general rules of civil procedure.
- h** I agree that my request for a loan, the loan and the contract between me and the lender shall be governed by the law of the place of my home address as stated in this form (or, if my address is outside the United Kingdom, the law of Northern Ireland).
- i** I irrevocably agree that the courts of the part of the United Kingdom in which my home address stated in this form is situated (or the English, Scottish and Northern Ireland courts where my address is outside the United Kingdom) shall have non-exclusive jurisdiction to hear any action or proceedings arising out of or in connection with the loan and the contract between me and the lender and I irrevocably submit to the jurisdiction of those courts and



waive any objection to the jurisdiction of those courts, provided that this shall not limit the lender's rights to take proceedings against me in any other court of competent jurisdiction.

- j I agree that from the date I submit this form until the date when my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I will notify the lender of any changes in the personal details (including National Insurance number) and contact details I have provided as required in accordance with the Regulations referred to in paragraph b.
- k In the event that I leave the United Kingdom to reside outside the United Kingdom or that for any other reason I am outside the UK tax system, I undertake to inform the lender in accordance with the Regulations referred to in paragraph b and I undertake to provide the lender with my new and any subsequent contact details until my loan, together with all and any interest, penalties and charges which apply, is fully repaid.
- l I agree to take all future action requested by the lender and provide the lender with all information required to ensure repayment, in accordance with the Regulations referred to in paragraph b.
- m If I breach any of the terms under which any loan(s) will be made I agree that I will be obliged to pay any charges and penalties which may apply under the Education (Student Support) (NI) Order 1998 and the Regulations made under that Order, as amended from time to time or successor legislation and/or Regulations.
- n I understand that the Student Loans Company will check my National Insurance number and personal details with the Department for Work and Pensions (DWP). If I do not know my National Insurance number, or if the number I provide cannot be authenticated, DWP will trace

and give my number to the lender.

- o If I have broken the terms of this contract I agree that the lender may share information held about me and my account with any person, including the government or a government agency of another country, who may assist in establishing my whereabouts and/or in taking action to recover outstanding loan amounts.

#### Disabled Students' Allowances (DSAs)

- I understand that any equipment I receive through DSAs must be used for my course of study and my ELB is not responsible for paying any repair costs.

#### Childcare Grant (CCG)

- 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.
- I understand that if I do not provide the evidence of childcare costs within the timescales set, I might lose my entitlement. Also if my payments to my childcare provider are different from the estimates I provide, I understand that further payment will increase or decrease accordingly, or if no further Childcare Grant payments are due to be paid to me, I may be liable to repay any difference.
- I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from the childcare element of: (i) the Working Tax Credit; (ii) Tax-Free Childcare; and/or (iii) the NHS 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 reserves the right to share my personal data with HMRC to check whether I am in receipt of childcare support from HMRC.

Customer Reference Number

Your full name   
(in BLOCK CAPITALS)

Your signature  Today's **DAY**   **MONTH**   **YEAR**

#### Bursary and scholarship data sharing consent will not affect your entitlement to any other financial support available.

If you started your course in academic year 2006/07 or after you may be eligible for a bursary or scholarship. In order for your university or college to determine and pay any non-repayable bursary or scholarship to which you may be entitled, we will need to share some of your personal, financial and course details as well as information about your eligibility for student finance with them. Most universities and colleges will not pay bursaries and scholarships if you do not give consent.

If you **do not** wish your details to be shared for this purpose, please tick this box.

 The relevant person(s) you indicated in section 8 must complete section 9, as well as the declaration(s) on page 25.

**Please pass this form to them now.**

**If you are a single independent student please go to page 28 to finalise your application.**

# financial details for tax year 2013-14 for parents and partners

## What details do I need to provide in this section?

In this section of the form you need to tell us some personal details and what your financial income was for tax year 2013-14. You **must** tell us your 2013-14 income details as we cannot accept amounts from any other tax year. We need your income amounts so we can work out what the student(s) you are supporting are entitled to. The household income assessment is based on who is living in the student's household at the time of application using their income from the prior financial year.

## Quick start guide

Section 9 is divided into 5 parts, this guide gives you a quick summary of each part.

### Part A

Tell us your name and address and some other personal information.

### Parts B and C

Answer every question, providing income amounts where appropriate.

### Part D

Answer every question, telling us about any income deductions you had during tax year 2013-14.

### Part E

If you have any children who are financially dependent on you, tell us about them here.

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 can be found in the guidance notes.

## What happens if my household income has dropped since tax year 2013-14?

If your household income has dropped by 5% since tax year 2013-14 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2015-16 instead of your actual income from tax year 2013-14 when calculating the student's entitlement. However, there must be at least a 5% drop in the **overall household income** (not just your own income) between these two tax years for us to do this and we will ask for evidence of your 2015-16 income at the end of that tax year.

# 9

## continued financial details for tax year 2013-14 for parents and partners

### Part A – Your personal details

#### Person 1

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth   /   /

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

Home address

Postcode

Home telephone number

Email address

#### Person 2

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth   /   /

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

Home address

Postcode

Home 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 2015/16 from [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk) and return it to us.

Alternatively, you can have the form sent to you by ticking the boxes below:

#### Person 1

Send me a separate form

 Tick

#### Person 2

Send me a separate form

 Tick

# financial details for tax year 2013-14 for parents and partners

## Part B - Your financial information

You do not need to submit with this form any evidence in support of the financial information you provide in this section. However, it is important that you keep all evidence relating to tax year 2013-14, as you may be asked to provide us with this evidence at a later date.

**Q1**

**If you are the student's parent, step-parent or parent's partner, you must answer this question.**

Give your total gross taxable income (before deductions) from all sources received from 6 April 2013 to 5 April 2014.

**Person 1**

£

**Person 2**

£

**Total gross taxable income**

£

**If you are the student's partner, you must answer this question.**

Give your total gross taxable income (before deductions) from all sources received from 6 April 2013 to 5 April 2014.

**Total gross taxable income**

£

### Instructions

- Please give financial details for tax year **6 April 2013 to 5 April 2014**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.



**Please note that if you leave any questions blank we will not be able to process this application.**

**Q2a** Did you receive Working Tax Credit or Child Tax Credit?

**Person 1**

Yes  No

**Person 2**

Yes  No

**Q2b** Did you receive Income Support?

Yes  No

Yes  No

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## financial details for tax year 2013-14 for parents and partners

**Q3** Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

- a** Total income from salary / wages 
- b** Total income from taxable state benefits 
- c** Total income from occupational pension(s)
- d** Total income from private pension(s)

**Person 1**

Yes  No

£

£

£

£

**Person 2**

Yes  No

£

£

£

£

**Q4** Did you receive any income from a state retirement pension? 

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

**Person 1**

Yes  No

£

£

**Person 2**

Yes  No

£

£

**Q5** Did you receive any income from savings and investments? 

- a** Total **interest** from UK banks, building societies and unit trusts
- b** Total income from UK life insurance gains, securities and partnerships
- c** Total income from UK investments and dividends
- d** Total income from foreign investment and dividends

**Person 1**

Yes  No

£

£

£

£

**Person 2**

Yes  No

£

£

£

£

# financial details for tax year 2013-14 for parents and partners

**Q6** Did you receive any taxable benefits in kind? 

	<b>Person 1</b>	<b>Person 2</b>
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▼	▼
Total income received from taxable benefits in kind	£ <input type="text"/>	£ <input type="text"/>

**Q7** Did you receive any other income during tax year 2013-14 that you **haven't** yet told us about?

<p><b>Person 1</b> <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p><b>Person 2</b> <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p><a href="#">Go to Part C</a></p> <p><a href="#">Go to Part D</a></p>	<p><a href="#">Go to Part C</a></p> <p><a href="#">Go to Part D</a></p>

## Part C - Other income

### Instructions

- Complete Part C in the same way you completed Part B giving financial details for tax year **6 April 2013 to 5 April 2014**.

**Q1** Did you receive any income from self-employment? 

	<b>Person 1</b>	<b>Person 2</b>
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▼	▼
<b>a</b> Total taxable profit from businesses	£ <input type="text"/>	£ <input type="text"/>
<b>b</b> Total taxable profit from partnerships	£ <input type="text"/>	£ <input type="text"/>

**Q2** Did you receive any income as a Minister of religion? 

	<b>Person 1</b>	<b>Person 2</b>
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
	▼	▼
Total taxable income minus expenses that are not included on your P60 or P11D	£ <input type="text"/>	£ <input type="text"/>

# 9

## continued financial details for tax year 2013-14 for parents and partners

**Q3** Did you receive any other taxable income or lump sums? 

**Person 1**

**Person 2**

Yes  No

Yes  No

Total income received

£

£

**Q4** Did you receive any income from property lettings? 

Yes  No

Yes  No

Total income received

£

£

**Q5** Did you receive any income from UK trusts? 

Yes  No

Yes  No

Total income received

£

£

**Q6** Did you receive any foreign income? 

Yes  No

Yes  No

Total income received

£

£

**Q7** Did you receive any income from an overseas pension? 

Yes  No

Yes  No

Total income received

£

£

**Q8** Did you receive any other overseas income and gains? 

Yes  No

Yes  No

Total income received

£

£

# financial details for tax year 2013-14 for parents and partners

## Part D – Income deductions

### Instructions

- Complete Part D in the same way you completed Part B giving financial details for tax year **6 April 2013 to 5 April 2014**.

**Q1** Did you pay any private pension contributions?

**Person 1**

Yes  No

**Person 2**

Yes  No

Total amount you paid

£

£

**Q2** Did you pay any Additional Voluntary Contributions (AVCs)?

**Person 1**

Yes  No

**Person 2**

Yes  No

Total amount you paid

£

£

**Q3** Did you have any allowable expenses on which you claimed tax relief? 

**Person 1**

Yes  No

**Person 2**

Yes  No

Total amount on which you claimed tax relief

£

£

# 9

## continued financial details for tax year 2013-14 for parents and partners

### Part E – Your dependants

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 2015/16

Include unearned income for **all** dependants. Only include earned income details for persons aged 16 and over. Do not count casual earnings of persons under 16.

Full name	Date of birth	Income for the year
	(DD MM YYYY)	

#### Q2 Child dependants in further or higher education in academic year 2015/16

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

If the student is your partner, please include any children they named in section 6 of this form if the children have applied for student finance.

Full name	Date of birth	School, college or university	Course	Are they receiving financial support? If so, from which authority or organisation?
	(DD MM YYYY)			

# Declaration for parents and partners

Before signing, you should read the Data Protection statement in the notes that accompany this form. 

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 I am supporting may have their financial support withdrawn and I may be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that the Education and Library Board (ELB) 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"/> <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"/> <input type="text"/> <input type="text"/>

**Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.**

If the student(s) started their course in academic year 2006/07 or after they 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 the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them. 

If you **do not** wish your details to be shared for this purpose, please tick this box.

**Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.**

If the student(s) started their course in academic year 2006/07 or after they 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 the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them. 

If you **do not** wish your details to be shared for this purpose, please tick this box.

## Deadline

To make sure the student receives their first payment at the start of term, this form must be returned with all of the evidence we need by **30 June 2015**. We will do our best to process this application as soon as possible, however if the deadline date has passed, the first payment may not be ready for the start of term.



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

## Additional notes

If you are providing extra information below please clearly mark what section and question the information is about.

## Additional notes

If you are providing extra information below please clearly mark what section and question the information is about.

# Checklist

Before returning this form, please make sure you have done the following:

- Fully answered all questions that apply to you Tick
- Enclosed all the documents we have asked for as evidence where you have seen this icon next to a question  Tick
- Signed and dated the relevant declaration(s) Tick
- Completed the loan request section if you are applying for a Maintenance Loan, Tuition Fee Loan or both. Tick
- Asked your parent(s) or partner to complete section 9 if applying for student finance based on your household income. Tick

When your completed application form with all the relevant evidence has been processed you will be sent a letter showing the amount of financial support you will receive.



**Remember to pay the correct postage or we may not receive your form.**

**You must return your completed form to the ELB address which can be found on the ELB finder available online at [www.studentfinancenl.co.uk](http://www.studentfinancenl.co.uk)**