

Additional Notes

Assessment of financial circumstances - Academic Year 2006/07

PFF2

This form is also available on our website at
www.studentfinancedirect.co.uk

Please complete the student's name in the following boxes before completing the rest of this form.

Student's forename(s): Surname:


Important Information

This form asks for information about your income. We need this information to help us determine a student's entitlement to student finance.

Please provide details of your income on this form if you are:

- The student's natural or adoptive parent;
- The student's step-parent;
- The husband, wife, civil partner or cohabiting partner of one of the student's parents;
- The student's husband, wife or civil partner; or
- The student's cohabiting partner, if the student is over 25 and entered higher education in 2000/01 or later.

Instructions

- Complete this form in black ink and use BLOCK CAPITALS.
- **Answer all the questions. If a question does not apply to you, write "N/A" or "None".** If you do not, we may return this form to you as it will appear incomplete. This may delay the student's application for student finance.
- Please refer to the Support Notes at the back of this form each time you see this icon. 
- **Once you have completed this form** and signed and dated the declaration, please return it to us at the address shown on the letter accompanying this form or on the contact list available online at www.studentfinancedirect.co.uk.

section

1

personal details

If the personal details pre-printed on this form are incorrect, please contact our Customer Support Office on 08456 077577.

a

Student's details

ART ID/ALIAS ID:

Forename(s):

Surname:

Date of birth:
 DAY MONTH YEAR

b

Your details (Please complete this section with the details exactly as they appear on your birth certificate or passport)

Forename(s): Surname:

Sex: Male ☐ Female ☐ Date of birth:
 DAY MONTH YEAR

Place of birth (name of the town or village):

If you have your own ART ID please write it here:

Relationship to student:

section

2

financial details

If you are the student's parent, step-parent or guardian, or if you are the husband, wife or partner of someone who is, you should answer these questions. 

You must answer every question, and write the amount "None" or "N/A" where appropriate.








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 the financial year 2005-06, as we may require this at a later date.

a

Give details of your gross taxable income from salary or wages (before deductions) received from 6 April 2005 to 5 April 2006. You can find these details on your P60.



£

b	Taxable benefits in kind: 	<input type="text" value="£"/>
c	Income from self-employment (estimate if you are not sure): 	<input type="text" value="£"/>
d	Income as a company director: 	<input type="text" value="£"/>
e	Income from the state retirement pension:	<input type="text" value="£"/>
f	Income from any other pensions:	<input type="text" value="£"/>
g1	Income from property, lettings or rents:	<input type="text" value="£"/>
g2	How much of this is through the rent a room scheme?	<input type="text" value="£"/>
h	Bank and building society gross interest (before tax): 	<input type="text" value="£"/>
i	Other investment income before income tax:	
	<input type="text" value="Type"/>	<input type="text" value="£"/>
	<input type="text" value="Type"/>	<input type="text" value="£"/>
j	Any other type of income:	
	<input type="text" value="Type"/>	<input type="text" value="£"/>
	<input type="text" value="Type"/>	<input type="text" value="£"/>
k	Income support:	<input type="text" value="£"/>
l	Income from other benefits: 	<input type="text" value="£"/>
m	Working Tax Credit:	<input type="text" value="£"/>
	Child Tax Credit:	<input type="text" value="£"/>
n	Amount of any private pension contributions you have paid: 	<input type="text" value="£"/>
o	Amount of any Additional Voluntary Contributions (AVCs) you have paid:	<input type="text" value="£"/>
p	Amount of any professional or employment-related expenditure on which you claim tax relief: 	<input type="text" value="£"/>

Identify any person, other than the student, who will be totally or mainly financially dependent on the person named in section 1b in the academic year 2006/07.



a **Dependants under 18**

Include any unearned income for ALL dependants under 18. Only include earned income details for persons aged 16 and 17. Do not count casual earnings of persons aged under 16.

Full name	Date of birth DAY MONTH YEAR	Income for the year

b **Dependants aged 18 and over in further or higher education**

Are they receiving financial support in academic year 2006/07? If so, from which authority or organisation?

Full name	Date of birth DAY MONTH YEAR	School, college or university	Course	

Data Protection Act 1998

This statement sets out who will use the information provided on the PFF2 form or otherwise in connection with the applicant's application for student finance and what they will use it for.

The information which you give on this form will be used to process student finance applications for persons dependent on you. The Secretary of State for Education and Skills has transferred certain functions relating to student finance applications to Local Education Authorities (LEAs). The Student Loans Company (SLC) also carries out certain functions on her behalf.

The LEAs and the SLC:

This Data Protection Statement applies generally to all students and their sponsors. However, if the applicant's LEA is taking part in a Pilot Scheme in the 2006/07 academic year, this will affect the role that it and the SLC play in relation to the applicant's application. The specific details are set out below.

The following LEAs are taking part in a '**Centralised Pilot Scheme**' in academic year 2006/07: **London Borough of Brent, Darlington Borough Council, London Borough of Hackney, Hartlepool Borough Council, North Yorkshire County Council, Redcar & Cleveland Borough Council, Southend-on-Sea Borough Council, South Tyneside Council, London Borough of Southwark, Stockton-on-Tees Borough Council and York City Council.**

If one of the LEAs mentioned is the applicant's LEA, their application for student finance will be dealt with by SLC and not the LEA. SLC will need the information provided in connection with the application to determine whether applicant's dependent on you are eligible for student finance and assess the maximum amount of financial support they are entitled to. SLC is the data controller for this information. SLC will need to keep personal information about you, your partner and your relatives so that it can audit its assessment of financial support. SLC will have access to your personal data in order to provide customer services to you and to respond to your questions and to update information on your account.

SLC will also be responsible, where there have been changes in the applicant's household financial circumstances, for carrying out reassessments of financial support decisions made in respect of academic years before the 2006/07 academic year. SLC will be the data controller for the information it needs to carry out these reassessments.

The Department for Education and Skills (DfES) is also a data controller for all of this information as it is responsible for it by law. However, if you would like to see your information please contact the SLC.

The following LEAs are taking part in a '**Hybrid Pilot Scheme**' in academic year 2006/07: **Cheshire County Council, Lancashire County Council, Leeds City Council, Manchester City Council and the London Borough of Sutton.**

If one of the LEAs mentioned is the applicant's LEA, the LEA will still deal with the application for student finance but SLC will be responsible for carrying out initial verification of evidence provided in support of the application and will be the data controller for this information. The SLC will also carry out some initial data entry work on behalf of the LEA.

If the applicant's LEA is participating in the **Hybrid Pilot Scheme** or is **not part of either Pilot Scheme**, it will need the information provided in connection with the application to determine whether applicant's dependent on you are eligible for student finance and to assess the maximum amount of financial support they are entitled to. The LEA is the data controller for this information. The LEA will need to keep personal information about you, your partner and your relatives so that it can audit its assessment of financial support. If you would like to see your

information please contact the applicant's LEA.

The applicant's LEA and SLC will have shared access to account information to provide customer services to you and to respond to your questions and update information on your account.

In all cases, SLC will need information provided in connection with the applicant's application to handle payments, as appropriate and is the data controller for this information. SLC will have to keep personal information about you for this purpose. The DfES is also a data controller for this information as it is responsible for it by law. However, if you want to see this information please contact SLC.

SLC may also use your information to maintain or develop its systems.

The applicant's university or college may ask for financial information that you provide in connection with the applicant's application for student finance (either on this form or at a later stage) for bursary administration purposes from the SLC, the applicant's LEA or the Secretary of State. This information will only be shared where you have consented for the information being shared for bursary administration purposes.

In this instance, the university or college will be the data controller of the information and will use it to assess eligibility and make payment of any bursary or scholarship to which the applicant may be entitled. If you would like to see this information please contact the applicant's university or college.

The Department for Education and Skills (DfES) may use the information you have provided on this form to monitor the performance of the student finance system and to develop future policy. Any published output from this statistical work will be anonymous and will not identify individuals.

The Higher Education Funding Council for England (HEFCE) and the Higher Education Statistics Agency (HESA) which carries out certain functions on behalf of HEFCE may, in carrying out HEFCE's statutory functions relating to the funding of education, use the information provided on this form for statistical analysis. HESA and HEFCE will not identify individuals in any published results.

By law, the LEA, SLC and the applicant's university or college must protect the public funds they handle and may use the information you have provided on this form to prevent and detect fraud. They may also share the information, for the same purposes, with other organisations which handle public funds.

Declaration

Please read the following declaration. We will not be able to process the student's application for student finance unless you sign and date this declaration.

- I confirm that to the best of my knowledge and belief, the information I have given on this form is true and complete and I understand that if I have given the LEA (or SLC where appropriate) false information, or have not given them complete information, I may be prosecuted and financial support withdrawn.
- I agree to supply any further information in relation to the applicant's application for financial support that the LEA (or SLC where appropriate) may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for student finance.

Your full name
(in BLOCK CAPITALS):

Your signature:

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"/>

Support Notes

General Information

If you think your income (before tax) for the financial year 2006-07 will be at least 15% less than your income for 2005-06 you must still complete this form but please give brief details of this expected reduction in income on the Additional Notes page at the back of this form. You may then be sent another form to complete because it may be possible to have the financial contribution worked out using income details for 2006-07. However, if two parents (or one parent and a step-parent or parents partner) in the household have their income taken into account, we consider the total of their two incomes together. We can only adjust the financial contribution if their total joint income has fallen by 15% or more. Therefore, it is only if the joint incomes of two parents (or one parent and a step-parent or parent's partner) are likely to fall by 15% or more that details of the expected reduction should be provided.

If there are other students in your household, we may need to ask for further information. This is because the rules which determine whose income we need to consider depend on when the student entered higher education, and there are different rules for students in different years of study. We will not ask for information we do not need.

If the student entered higher education before 1st September 2005.

- The student's natural or adoptive parent; or
- The student's husband, wife or partner, if the student is over 25 and entered higher education in 2000/01 or later.

You are the student's partner if you live together as though you were that person's husband or wife, and are of the opposite sex.

If the student entered higher education on 1st September 2005 or after.

You are a person's cohabiting partner if you live together as though you were that person's husband, wife or civil partner but you are not married or in a civil partnership. This applies whether you are the same or opposite sex.

If you cannot show actual amounts for any item, you should provide an estimate and write "(E)" beside the amount on the form.

Section 2

a. Please give details of income in the financial year 2005-06. Normally this will be the year ending 5 April 2006, but may differ if your business has a tax year which does not end in April. "Your income" means your gross taxable income before tax, occupational pension and other deductions. State your income without taking into account any of the following:

- any personal relief;
- payments under covenant;
- deductions for tax, National Insurance, etc; and
- non-taxable income.

Also give any income you get from abroad, which is not covered by UK tax, and about any of the benefits asked for, if you get them.

Also include overtime, bonuses and commission, and any income from employment overseas for the financial year 2005-06.

Support Notes

- b.** 'Benefits in kind' means benefits other than money that you get from your employment, and might include a company car, meals, accommodation or private health insurance. Only include benefits on which you must pay tax.
- c.** You should give the details shown on your self-assessment form for your trading year which ends during the period 6 April 2005 to 5 April 2006.
- d.** If you have already included your income as a company director as part of your income in question 2a or 2c do not repeat it here again.
- h.** Give the interest you receive before tax. You should not include interest you receive from ISAs.
- i.** Only include money you get from the following benefits: Jobseekers Allowance, Bereavement Benefit, Industrial Death Benefit, Invalid Care Allowance, Statutory Maternity Pay, Statutory Sick Pay, Widowed Mother's Allowance and Widow's Benefit. You should also include the amount of Incapacity Benefits you received after 28 weeks of incapacity. Do not include anything you get for the first 28 weeks.
- n.** Do not include superannuation.
- p.** This includes anything you can claim tax relief on because it is a necessary cost of your employment. If you are a minister of religion, include here deductions made from your income for tax purposes.

Section 3

Academic Year start and end dates

The period for which we require financial information in this section is determined by the students academic year start and end dates.

The first day of the academic year is not necessarily the day on which the student begins that year of their course. It is decided by the period during which their year begins.

The academic year starts on:

- 1 September, if their study begins between 1 August and 31 December inclusive, and ends on 31 August 2007;
- 1 January, if their study begins between 1 January and 31 March inclusive, and ends on 31 December 2007;
- 1 April, if their study begins between 1 April and 30 June inclusive, and ends on 31 March 2008; or
- 1 July, otherwise, and ends on 30 June 2008.

For example, if the student starts their year of study on 4 October 2006, the academic year runs from 1 September 2006 until 31 August 2007 and this is the period of time for which you must provide financial details for any dependents.

Declaration

If you cannot sign this form, for whatever reason, it must be signed on your behalf by someone who holds a valid Power of Attorney. The Power of Attorney letter must be sent with this form before a signature from that Power of Attorney will be accepted.

You must notify the LEA (or SLC where appropriate) about any change in your circumstances, which may affect the applicant's entitlement to financial support. The most common change of circumstances would be if:

- your household income changes; or
- your marital status changes.

Additional Notes