

student finance england

Application for Student Finance (Continuing Students)

2010/11

You can also apply online at

www.direct.gov.uk/studentfinance

| Forename(s): | |
|--------------|--|
| () | |
| Surname: | |
| Garrianie. | |

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 6 weeks.
- A degree course in a health related discipline and you will, or are likely to receive an **income assessed** bursary from the National Health Service (NHS), or the Department of Health (DoH).

This form should be completed in conjunction with the notes. The notes will give you extra information to help you complete the form correctly so that there are no delays with processing your application due to incorrect answers, missing information or lack of evidence.

Deadlines

If you are applying for student finance which **does not** require any financial information to be provided, you must return your form to us by **23 April 2010** in order to ensure you receive your first payment at the start of term.

If you are applying for student finance which **does** require financial information to be provided, you must return your form to us by **21 May 2010** in order to ensure you receive your first payment at the start of term.

If you miss this deadline, your application will be processed as soon as possible, but your first payment may not be available at the start of term.

This form should be returned within 9 months of the start of your academic year, otherwise you may lose your full entitlement to student finance.







finance available

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

- Maintenance Loan
- Tuition Fee Loan
- Parents' Learning Allowance
- Adult Dependants' 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 Grant

You can find more detailed information on what is available and what you might be entitled to in 'A guide to financial support for higher education students 2010/11' or by using our Student Finance Calculator. Both are available from www.direct.gov.uk/studentfinance.

You can apply in 5 easy steps

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

We have provided guidance notes to help with any difficult questions 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.

Step

• Complete sections 2-4.

For all students

- - Don't forget 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.
 - You do not need to complete section 4 if you are only applying for a Tuition Fee
- If you only want to apply for a Tuition Fee Loan or a reduced rate of Maintenance Loan you can go to Step 5.

Step

For students who want student finance based on household income

- Complete sections 5 and 6.
- If you think you qualify for the Special Support Grant, please tick this box. Detailed information about who can qualify for the Special Support Grant and what evidence needs to be provided can be found in the notes. ne

Step

For students who have dependants

- Complete section 7.
- You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.
- If you are a single independent student go directly to **Step 5**.



Step

For students who want student finance based on household income

- Complete section 8.
- Depending on your answers in section 8 you may need to ask your parent(s) or partner to provide details about their income in section 9 so we can work out what your full entitlement to student finance will be.

Step

For all students

 Make sure that you have signed the Student Declaration on pages 15/16. If you asked someone to complete section 9, make sure that they have signed their declaration(s) on page 23.

Other student finance available

| Childcare | Grant | n |
|-----------|-------|---|

If you want to apply for the Childcare Grant you need to complete this form then complete a Childcare Grant application form.

Please send me a Childcare Grant application form:

| LICK |
|------|
| |

Disabled Students' Allowances (DSAs)

If you want to apply for DSAs you need to complete this form then complete a Disabled Students' Allowances application form.

| Please send me a DSA form: | |
|------------------------------------|--|
| i icase seria file a bs/ (forfil. | |

| | Гi | _ | 6 |
|--|----|---|---|

Childcare Grant and DSA application forms can also be downloaded from www.direct.gov.uk/studentfinance or requested by calling us on 0845 300 50 90.

What if I have further questions?

If you have further questions you can:

- visit www.direct.gov.uk/studentfinance
- refer to 'A guide to financial support for higher education students 2010/2011' which can be downloaded from www.direct.gov.uk/studentfinance.
- call us on **0845 300 50 90**

Where do I send my form?

Return this form to us at the address shown on the back of this form or on the contact list available online at www.direct.gov.uk/studentfinance.



Please remember to pay the correct postage.

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personal details

| | Customer Reference Number (if you have one) | | |
|---|---|--|--|
| | Personal details | | |
| а | 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 y correspondence address. | you know it, please also give your term-time | |
| | Home Address | Term-time Address | |
| | | | |
| | | | |
| | Postcode: | Postcode: | |
| | Home phone number: | Date on which you will move to this address: DAY MONTH YEAR | |
| | Mobile phone number: | | |
| | Email address: | | |
| - | | | |
| | Marital status | | |
| С | Please tick one box: | | |
| | Single | | |
| | Living with a partner n | | |
| | Married/civil partnership Pleas | se give the date of marriage/civil partnership | |
| | Separated e | | |
| | Divorced/dissolved civil partnership | | |
| | | | |
| | ── Widowed/surviving civil partner € | | |

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about your course and your university or college

| а | Full tuition fee amount for the academic year 2010/11. |
|---|--|
| | If you are unsure about the tuition fee amount you will be charged, please contact your university or college for clarification. |
| | If any of your course or university and college details have changed in any way since you applied for student finance for the previous academic year, you must complete all of the questions in this section with the new details. |
| b | Will you be studying at exactly the same university or college and on exactly the same course that you were in the academic year 2009/10? Yes No |
| С | University/college details University/college name and address |
| | UCAS personal identification number UCAS university/college code UCAS campus code (if applicable) |
| d | Course details 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 (e.g. BSc Physics) Course start date Course end date Course length (years) |
| | |

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about your course and your university or college

| Year of course | Foundation | ion Third year |
|---|-----------------------|---|
| | First year | r Fourth year |
| | Second y | year Other (give details) |
| | | |
| If the course is franchise | ed to another univers | sity/college, give the address of the other |
| university/college | | |
| | | |
| | | |
| | | |
| | | Postcode |
| Course type (please tie | ck one box): | |
| Full time undergradu | ate | Annual haddens (C |
| Initial Teacher Training | (ITT) courses | Answer both questions Number of weeks you will be |
| Flexible postgraduate | e ITT | studying full-time in academic |
| Part-time undergradu | uate ITT | year 2010/11. Number of weeks you will be |
| Part-time ITT (excluding first degre | ees) n | on full-time teaching practice in academic year 2010/11. |
| Full-time postgradua | te ITT | |
| Other course types | | |
| Full-time distance lea | arning | Do you have a disability which prevents you from attending your university/college in |
| Full-time foundation | degree | person? e Yes No |
| Full-time involving a | placement (sandwic | ch course) |
| | • | ce on a dance and drama |
| course at a privately-fun | | |
| Have you applied, or will bursary, for the academic | | or any bursary or award, excluding a social work |
| National Health Service | • | if any of the following. |
| Department of Health | ` , | |
| | | Bursary (Scottish Healthcare Allowance) |
| If you applied for suppor | t, whether or not yo | ou received it, tick 'Yes'. Yes No |
| | | essed or non-income assessed? |
| Income assessed | Non-income as | ssessed |

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about your course and your university or college

| | Term details | | | |
|---|--|--|--|--|
| h | Where will you live during the academic year 2010/11? | | | |
| | Term 1 Living with parent(s) Elsewhere or own home | | | |
| | Term 2 Living with parent(s) Elsewhere or own home | | | |
| | Term 3 Living with parent(s) Elsewhere or own home | | | |
| i | Where will you spend most of your time studying in the academic year 2010/11? | | | |
| | Term 1 University or college Study abroad Placement in the UK or abroad | | | |
| | Term 2 University or college Study abroad Placement in the UK or abroad | | | |
| | Term 3 University or college Study abroad Placement in the UK or abroad | | | |
| | if you have ticked 'University or college' and/or 'Study abroad' for all 3 terms go to Section 4 | | | |
| j | Where will your placement be? | | | |
| | Abroad If your placement is abroad, have you | | | |
| | UK been accepted onto the ERASMUS exchange scheme? | | | |
| | Don't know | | | |
| | Placement name and address, if known | | | |
| | | | | |
| | | | | |
| | | | | |
| | Postcode | | | |
| | Is the placement: | | | |
| | paid | | | |
| | unpaid | | | |
| | If you ticked '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 or overseas institution; or | | | |
| | an unpaid placement that is not listed above. n | | | |

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your UK bank or building society account details

| UK bank/building society account details | | |
|--|--|--|
| This account must be in your own name and be able to accept direct credits. 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. | | |
| 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 both, 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: | If you wish to a | ailable to you: apply for less than the maximum ou, please state the amount. | Tick £ |
| | | depending on your circumstances. Yo ging before you apply for a Tuition F | |
| Amount of Tuition Fee Loan you would like to apply for: | If you wish to a | ailable to you: apply for less than the maximum ou, please state the amount. | Tick £ |
| Contact details Please give the names and addresses of two contacts. The contacts you give should live at different addresses and will only be contacted if, for example, you move address and do not inform us. You must inform your contacts that you are providing us with their details. Contact 1 Contact 2 | | | ress and do |
| Forename(s): | | Forename(s): | |
| Surname: | | Surname: | |
| Relationship to you: | | Relationship to you: | |
| Postcode: | | Postcode: | |
| Address: | | Address: | |
| Country: | | Country: | |
| Phone number: | | Phone number: | |
| | | | |

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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? |
| | if 'Yes', you are an independent student, go to Section |
| a 2 | Have you been married or in a civil partnership at any time before the first day of the academic year? Yes No |
| a 3 | Will you have the care of a person under the age of 18 on the first day of the academic year? |
| | if 'Yes', you may be considered an independent student go to Section |
| | 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 |
| 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. |
| | 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 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 |

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. | | | | | |
|---|---|---|----------------------|---------------------------|----------------|--------|
| a | Unearned income Taxable unearned income Bank or building socome Property, lettings or Dividends or investme Trusts or sponsorshice Any other payment re | ciety gross interestrent. nents. ps. received for attentatal taxable unear | st. ding the course | e. efore | | |
| | deductions, that you e | expect to receive | in academic ye | ar 2010/11. n | £ | |
| | What is the source of | this income? | | | | |
| b | Payments from an e Will your employer be for the academic year If 'Yes', how much will attending your course | releasing you to 2010/11? I your employer p | pay you for time | Yes | No if 'No' g | o to d |
| С | During the academic year 2010/11, will you or your employer pay any money into a pension fund on your behalf? If 'Yes', how much during this period? | | | | | |
| d | Dependent children Give details of any ch the academic year 20 When stating the child social security contrib | 10/11. d's income, includ | • | | | |
| | Child's full name | Date of birth | Relationship to you | Whom will they live with? | Child's income | |
| | | (DD MM YYYY) | | | | |



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

| Are you a lone parent? | | Yes No if | 'Yes' g |
|---|--|--|---|
| Are you under 25, living with a pa Childcare Grant or Parents' Lear | | Yes No | f 'No' g |
| Give the total estimated income a academic year 2010/11 for: | after income tax and Nationa | Il Insurance deduction | ns in the |
| You: £ | Your partner: | £ | |
| How much of this will be Child Ta | ax Credit for the academic ye | ear 2010/11? | |
| You: £ | Your partner: | £ | |
| academic year 2010/11. | d's, wife's, partner's or other Husband, wife or partner | adult dependant's inc | |
| academic year 2010/11. Income from earnings | | Other adult depend | dant |
| academic year 2010/11. Income from earnings after deductions | Husband, wife or partner | Other adult depend | dant endant |
| academic year 2010/11. Income from earnings after deductions Adoption Agency payments | Husband, wife or partner £ Husband, wife or partner | Other adult depend £ Other adult dep £ Other adult dep | dant endant endant |
| Income from earnings after deductions Adoption Agency payments Any disability pension or benefit | Husband, wife or partner £ Husband, wife or partner £ Husband, wife or partner | Other adult depend £ Other adult dep £ Other adult dep £ Other adult dep | dant endant endant endant |
| Income from earnings after deductions Adoption Agency payments Any disability pension or benefit Child Benefit | £ Husband, wife or partner £ Husband, wife or partner £ Husband, wife or partner | Other adult depend £ Other adult dep £ Other adult dep £ Other adult dep £ Other adult dep | dant endant endant endant endant |
| Income from earnings after deductions Adoption Agency payments Any disability pension or benefit Child Benefit Guardian's Allowance Fostering or Boarding Out | Husband, wife or partner £ Husband, wife or partner | Other adult depend £ Other adult dep | dant endant endant endant endant |
| Income from earnings after deductions Adoption Agency payments Any disability pension or benefit Child Benefit Guardian's Allowance Fostering or Boarding Out payments | £ Husband, wife or partner | Other adult depend £ Other adult dep | dant endant endant endant endant endant |
| Give an estimate of your husband academic year 2010/11. Income from earnings after deductions Adoption Agency payments Any disability pension or benefit Child Benefit Guardian's Allowance Fostering or Boarding Out payments Residence Order Allowance Child Tax Credit | £ Husband, wife or partner £ Husband, wife or partner | Other adult depend £ Other adult dep £ Other adult dep | dant endant endant endant endant endant |



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

| | | Husband, wife or partner | Other adult dependant |
|--|------------------------------|---|----------------------------------|
| All other incom | е | £ Husband, wife or partner | £ Other adult dependant |
| If other, what is | s it? | | |
| If applying for A | Adult Dependants' | Grant, please indicate who | the adult dependant is. |
| Your husband | Your wife | Your partner (if you are 25 or over) | Other adult dependant |
| | | ents you have before the s | tart of the course which you, yo |
| nuspand, wife (| or partifier will com | linde to pay for you during | are doddernie year. |
| Type: | £ | Type: | £ |
| | | | · <u>-</u> |
| Type: Type: Answer this quantum of the second of the secon | £ £ uestion if you are | Type: Type: applying for Childcare (| £ £ Grant. |
| Type: Type: Answer this question to you, your here | £ £ uestion if you are | Type: Type: applying for Childcare (artner receive, or expect to | £ £ Grant. |

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about your family

| If you are an independent student with a pages 15/16 and then pass this form to you lif you are a single independent student , g | r partne | er to complete section 9 . |
|--|----------|---|
| With which parent do you normally live, or have What we mean by 'parent', for the purposes on when you started in hig | /e more | e contact with? ng out your household income, can |
| Mother Father | or | Both N/A |
| | | |
| What is the marital status of this parent? Single Living with a partner Married/civil partnership Separated Divorced/dissolved civil partnership Widowed/surviving civil partner | | Now please read and sign the Stude Declaration on pages 15/16 and the pass this form to the person(s) who you have indicated in 'question a' to complete section 9 . |
| Have your parents divorced, separated or been in a civil partnership which has been dissolved, since 1 September 2009? Yes No | | |
| Now please read and sign the Student Declaration on pages 15/16 and then pass this form to the person(s) who you have indicated in 'question a' to complete | | |

Student Declaration n

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 2010/11.

You should 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 2010/11. If you don't apply for these in academic year 2010/11 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 might be refused financial support, or prosecuted and my financial support withdrawn.
- I agree to give SLC (or my LA where appropriate) 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.

Loan Contract

- a I have read and understood the booklet 'Student loans: A guide to terms and conditions'.
- b I acknowledge and agree that any loan(s) made to me by the Secretary of State for Business, Innovation and Skills, 'the lender' (which includes any persons exercising functions on behalf of the Secretary of State pursuant to section 23(4) of the Teaching and Higher Education Act 1998 as amended from time to time or successor legislation, 'the Act') will be on the terms set out in the Loan Request Form including these declarations and in Regulations which are made under section 22 of the Act as amended from time to time.
- c I undertake to repay the lender any loan(s) made to me, together with all and any interest, penalties and charges which apply.

- d 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.
- e 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.
- f 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.
- g 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 application form (or, if my address is outside the United Kingdom, English law).
- h I irrevocably agree that the courts of the part of the United Kingdom in which my home address stated in this application 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.
- i 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.



- j 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.
- k 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.
- I 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 Teaching and Higher Education Act 1998 and the regulations made under that Act, as amended from time to time or successor legislation and/or regulations.
- m I understand that the Student Loans Company (SLC) 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.
- n 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 SLC (or my LA where appropriate) is not responsible for paying any repair costs.

Childcare Grant

- 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 the Working Tax Credit and I agree to tell SLC (or my LA where appropriate) immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support.

| Customer Reference Number: | | | | | | |
|---|------|----------------|--|--|--|--|
| Your full name | | | | | | |
| (in BLOCK CAPIT | (LS) | DAY MONTH YEAR | | | | |
| Your signature | X | Date: Date: | | | | |
| Your decision about 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 23. Please pass this form to them now. | | | | | | |
| If you are a single independent student please now go to page 24 to finalise your application. | | | | | | |



financial details for the tax year 2008-09 for parents and partners

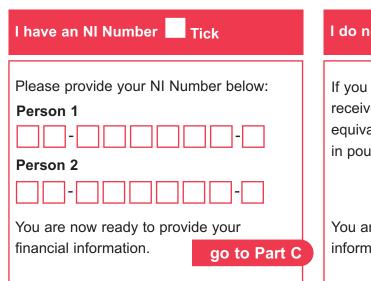
| To complete this section you must provide details in Parts A - D: | | | |
|---|---|--|--|
| Part A – Your personal details Part B – Data sharing and you Part C – Your financial information Part D – Your dependants | | | |
| Part A – Your personal details | | | |
| Person 1 | Person 2 | | |
| Your Customer Reference Number (If you have one) | Your Customer Reference Number (If you have one) | | |
| | | | |
| Relationship to the student | Relationship to the student | | |
| Relationship to the student | Relationship to the student | | |
| Title | Title | | |
| Title | Title | | |
| Forename(a) | Faranama(a) | | |
| Forename(s) | Forename(s) | | |
| Surname | 0 | | |
| Surname | Surname | | |
| | | | |
| Date of birth// | Date of birth// | | |
| Place of birth | Place of birth | | |
| (name of town or village exactly as it appears on your birth certificate or passport) | (name of town or village exactly as it appears on your birth certificate or passport) | | |
| City your birth dortmoute or passporty | on your birtin certificate or passport) | | |
| Llama address | Harris address | | |
| Home address | Home address | | |
| | | | |
| | | | |
| Postcode | Postcode | | |
| Contact telephone number | Contact telephone number | | |
| | | | |
| Email address | Email address | | |
| | | | |
| You do not have to disclose your financial information | on to the student. | | |
| If you would like to provide them separately, you ca | n download the relevant form from | | |
| www.direct.gov.uk/studentfinance 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 Tick Person 2: Send me a separate form Tick | | | |





Part B – Data sharing and you

This year it may be possible to share the information that you give us with other Government bodies, allowing us to gain the most accurate financial information possible. This can only be done if you have a valid National Insurance (NI) Number.



I do not have an NI Number

Tick

If you do not have a NI Number because you receive non-UK taxable income, please provide the equivalent financial information in pounds sterling.

You are now ready to provide your financial information.

go to Part C



| Pa | art C – Your financial information | | | | |
|--------------------|--|---------------------------------|---------------------------------|--|--|
| F If a to | Please give financial details for the period from 6 April 2008 to 5 April 2009. Answer 'Yes' or 'No' to all 17 questions in Part C, providing income details where applicable. Please note that if you leave any questions blank we will not be able to process this application. If you have provided financial details and evidence for this student's application in a previous academic year, you only need to give us your 2008-09 financial details just now. You do not need to send us any evidence. However, you should keep all of your 2008-09 financial evidence as we may ask for it at a later date to verify the details you have provided. | | | | |
| | Did you receive Working Tax Credits or Child Tax Credits? Did you receive Income Support? | Person 1 Yes No Person 1 Yes No | Person 2 Yes No Person 2 Yes No | | |
| | you receive for that income type. If you need help to calculate the total income you should refer to the guidance notes. | | | | |
| Q3 n | Did you receive any income from salary, wages, occupational pensions or taxable state benefits? | Person 1 Yes No | Person 2 Yes No | | |
| | Total income received: | £ | f | | |
| Q4 n | Did you receive any income from Self-employment? Combined total income showing on your | Person 1 Yes No | Person 2 Yes No | | |
| | SA103 and/or SA200 forms: | £ | £ | | |
| | Total income showing on your SA104 form: | £ | f | | |

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| Q5 Did you receive any income from a State Retirement Pension? Total non-lump sum amount received: | Person 1 Yes No | Person 2 Yes No |
|--|-----------------|-----------------|
| Total lump sum amount received: | £ | £ |
| Q6 Were you a Minister of religion? Total income (minus expenses not included on your P60 or P11D): | Person 1 Yes No | Person 2 Yes No |
| Q7 Did you receive any income from savings and investments? Combined total income showing on your SA100 and SA200 forms or on your bank | Person 1 Yes No | Person 2 Yes No |
| statements/letters if you were not Self Assessed: | £ | £ |
| Total income showing on your SA101 form: | £ | £ |
| Total income showing on your SA104 form: | £ | £ |
| Total income showing on your SA106 form: | £ | £ |
| Q8 Did you receive any taxable benefits in kind? | Person 1 Yes No | Person 2 Yes No |
| Total income from taxable benefits in kind: | £ | £ |
| Q9 Did you receive any other taxable income or lump sums? | Person 1 Yes No | Person 2 Yes No |
| Total other taxable income or lump sums: | £ | £ |
| Q10Did you receive any income from property lettings? | Person 1 Yes No | Person 2 Yes No |
| Total income from property lettings: | £ | £ |



| Q11 Did you receive any income from UK trusts? | Yes No | Yes No |
|--|------------------|-----------------|
| Total income from UK trusts: | Person 1 | Person 2 |
| Q12 Did you receive any foreign income? | Yes No | Yes No |
| Total foreign income: | £ Person 1 | £ Person 2 |
| Q13 Did you receive income from an Overseas Pension? | Yes No | Yes No |
| Total income from an Overseas Pension: | £ Person 1 | £ Person 2 |
| Q14 Did you receive any other overseas income and gains? | Yes No | Yes No |
| Total income from other overseas income and gains: | £ | £ |
| Obligations | | |
| Q15 Did you pay any private pension contributions? | Person 1 Yes No | Person 2 Yes No |
| Total private pension contributions you paid: | £ | £ |
| Q16 Did you pay any Additional Voluntary contributions (AVCs)? | Person 1 Yes No | Person 2 Yes No |
| Total Additional Voluntary Contributions you have paid: | £ | £ |
| Q17 Did you have any allowable expenses on which you claimed tax relief? | Person 1 Yes No | Person 2 Yes No |
| Total allowable expenses on which you claimed tax relief: | £ | £ |

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| Part D – Your dependants n | | | | | | |
|--|--|--|--|-------------------------|--|--|
| Identify any person w | Identify any person who will be wholly or mainly financially dependent on you. | | | | | |
| Q1 Child dependan | ts <u>not</u> in further | or higher education | n in academic year 2 | 010/11 n | | |
| | | dependants. Only incearnings of persons | | etails for persons aged | | |
| Full name | | Date of birth | Income for t | Income for the year | | |
| | | (DD MM YYYY) | | | | |
| Do not include If the student is | the applicant on | this form for student ease include any child e. School, college or university | n academic year 201 finance when complet dren named in section Course | ing this question. | | |
| | (DD ININI TTTT) | | | | | |

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 I might 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 Student Loans Company (SLC) (or the Local Authority where appropriate) may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.

| Inight affect this application for infancial support. | | | |
|---|--|--|--|
| Person 1 | Person 2 | | |
| Your full name (in BLOCK CAPITALS): | Your full name (in BLOCK CAPITALS): | | |
| Your signature: | Your signature: | | |
| X | X | | |
| DAY MONTH YEAR Date: | DAY MONTH YEAR Date: | | |
| Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available. | Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available. | | |
| If a student 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. | If a student 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. | | |

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You must now pass this form back to the student.

| Checklist Before returning this form, please make sure you have done the following: • Fully answered all questions that apply to you. • Enclosed all the documents we have asked for as evidence where you have seen this icon next to a question. • Signed and dated the relevant declaration(s). Tick Within 6 weeks of returning your completed application form with all the relevant evidence, you will be sent a letter showing the amount of financial support you will receive. |
|---|
| Please remember to pay the correct postage. |
| You must return your completed form to the address shown below or on the contact list available online at www.direct.gov.uk/studentfinance. |



student finance england

Notes to help you complete your Application for Student Finance (Continuing Students)

2010/11

This form is also available on our website

www.direct.gov.uk/studentfinance

Student Finance England is a partnership between Local Authorities (LAs) and Student Loans Company (SLC) for delivering financial support to students on behalf of the Department for Business, Innovation and Skills (BIS).

You should **not** be completing the PR1 form if any of the following apply to you:

- You normally live in Wales, Scotland, Northern Ireland, the Channel Islands or the Isle of Man, but you have moved or will be moving to England to undertake this course. If this is the case, you should contact whichever of the following organisations is relevant:
 - · Your Local Authority (LA) in Wales
 - The Student Awards Agency for Scotland (SAAS)
 - Your local Northern Ireland Education and Library Board (ELB)
 - The Education Department of Guernsey or Jersey
 - The Education Department for the Isle of Man
- You are studying on a distance learning course for a reason which is not related to a disability. If this is the case, you should instead complete a PTG1 form to apply for student finance. The PTG1 form will be available from August 2010.
- You are a national of a European Union Member State and you have moved to England to attend a higher education course. If this is the case, you should contact the EU Customer Services Team at: PO Box 89, Darlington, County Durham, England, United Kingdom, DL1 9AZ. Phone: 0141 243 3570.
- You are, or will be attending a part-time higher education course other than for Initial Teacher Training. In some circumstances, you may qualify for help if you are taking a part-time course. For more information you should phone us on 0845 300 50 90.
- You will be starting a course in a health related discipline and will be receiving a bursary
 from the National Health Service (NHS) or Department of Health (DoH) which is not
 assessed on your household income, excluding the social work bursary.

You must use these notes whenever you see this icon within the main PR1 form. **n**Any evidence that you are required to provide is also outlined in these notes and is marked with this icon.

Wherever you see this evidence icon on the PR1 form, you should check these notes for information on the evidence required.

Maintenance Loan REPAYABLE

You may not be eligible for a Maintenance Loan if you already hold a UK honours degree, unless you are taking a particular vocational degree.

section

If you are assessed as being eligible to receive the Maintenance Grant then the amount of Maintenance Loan available to you may be reduced.

Tuition Fee Loan REPAYABLE

You may not be eligible for a Tuition Fee Loan if you already hold a UK honours degree.

If you are undertaking a course at a university or college in England, Wales or Northern Ireland that is charging variable or flexible tuition fees, up to a maximum of £3,290, you will be able to take out a Tuition Fee Loan to cover some or all of these fees (depending on how much you are charged and how much you wish to borrow).

If you are undertaking a course at a university or college in England, Wales or Northern Ireland that is not charging variable or flexible tuition fees then the tuition fee chargeable could be any amount up to a maximum of £1,310. You can apply for a Tuition Fee Loan to cover this cost.

If you are undertaking a course at a university or college in Scotland, you can apply for a Tuition Fee Loan to cover the amount of tuition fees that your university or college will charge you, up to a maximum of £3,290.

If you started your course before academic year 2006/07 or you were a gap year student who started your course in academic year 2006/07, your university or college can charge tuition fees up to a maximum of £1,310. You can apply for a Tuition Fee Loan to cover this cost. However, if you choose to apply for a Grant for Tuition Fees then the amount of Tuition Fee Loan you can apply for will be dependant on how much Grant for Tuition Fees you are entitled to.

If you are undertaking a course at a private university or college then you may be charged more than £3,290 for tuition fees. You can still apply for a Tuition Fee Loan up to the maximum of £3,290 if your course is one that qualifies for tuition fee support.

The Tuition Fee Loan borrowed will be paid directly to the relevant university or college once your attendance is confirmed.

Parents' Learning Allowance (PLA) NOT REPAYABLE

The amount you receive depends on your income and that of your dependants (including your husband, wife or partner). It is not counted by Jobcentre Plus or housing benefit departments when calculating your other benefits, so you do not have to choose between Parents' Learning Allowance and other benefits. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2010/11'.

Adult Dependants' Grant (ADG) NOT REPAYABLE

This grant is dependent on your income and any income of your dependants. You can only apply for this grant if you are married, in a civil partnership, living with a partner of either sex or have another adult dependant. You can only apply for this grant for one adult dependant; if you have more than one adult dependant, you can still only receive one grant. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2010/11'.

Travel Grant NOT REPAYABLE

If you have to study at a university or college outside the UK for the majority of any term in the academic year or if you have to attend a place in the UK away from your main college or university as part of your medical or dental training, you may be eligible for help with the cost of travel. You may also be able to get help to cover the cost of medical insurance, visa costs and vaccinations. The support you receive is dependent on your household income.

If you have extra travel costs because you are disabled or have a specific learning difficulty, apply for Disabled Students' Allowances instead.

You will be sent further forms to complete about your travel costs.

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Disabled Students' Allowances (DSAs) NOT REPAYABLE

These can help pay for the extra course-related costs you may have as a result of your disability, mental health condition or specific learning difficulty. This includes special equipment, a non-medical helper or special travel arrangements.

If you want to apply for DSAs only, you should complete sections 2-3 of this form and return it to us. We will then send you another form that asks more specific questions about your disability/specific learning difficulty. Alternatively, if you want to send us all the details in one go you should complete a full DSA1 form instead of this form. You can download a full DSA1 application form at www.direct.gov.co.uk/studentfinance.

- evidence of your condition such as a letter from your doctor or an appropriate specialist. If you have a specific learning difficulty (for example, dyslexia), you will need to provide evidence of this in the form of a diagnostic assessment carried out by a psychologist or suitably qualified specialist teacher, this will help us process your application more quickly. If you do not have this evidence yet, send this form to us now and send in the evidence of your disability, mental health condition or specific learning difficulty later. We will contact you to ask for the extra information we need.
- e If you are taking your course by distance learning or otherwise undertaking but not attending a course in person for a reason which relates to your disability, you can apply for all types of student finance (except Travel Grant) as if you were attending in person. The evidence you send must show that you are unable to attend university or college in person for a reason which relates to your disability. For further information please refer to 'Bridging the Gap: a guide to the Disabled Students' Allowances (DSAs) in higher education 2010/11'.

Childcare Grant NOT REPAYABLE

You may get help with some of your childcare costs, depending on your income, and any income of your dependants, if you have dependent children aged under 15 at the beginning of the academic year - or under 17 if they have special educational needs - and you need childcare services for them. You may be able to get help with childcare costs during vacations as well as during term-time. Your childcare provider must be registered or approved for you to receive this grant. You cannot have this grant if you or your partner receives the childcare element of Working Tax Credit; you have to choose one or the other. For further information please refer to our guide 'Childcare Grant and other support for full-time student parents in higher education 2010/2011'.

Students who started their course in academic year 2006/07 or after (excluding gap year students who started in 2006/07) may be eligible for the following:

Maintenance Grant NOT REPAYABLE

You will not be eligible to receive a Maintenance Grant if you are eligible to receive a Special Support Grant.

The amount of Maintenance Grant you receive will affect the amount of Maintenance Loan you are entitled to and is dependent on your household income.

If you are continuing on a postgraduate or equivalent level Initial Teacher Training (ITT) course, which started **before 1 September 2009**, and choose not to provide any financial information you will be eligible to receive £1,292 Maintenance Grant (£646 for part time ITT students). If you choose to provide financial information then you may be eligible to receive up to £2,906 Maintenance Grant (£1,453 for part time ITT students).

If you are continuing on a postgraduate or equivalent level Initial Teacher Training (ITT) course, which started on or **after 1 September 2009**, and choose not to provide any financial information you will be eligible to receive £1,106 Maintenance Grant (£553 for part-time ITT students). If you choose to provide financial information then you may be eligible to receive up to £2,906 Maintenance Grant (£1,453 for part-time ITT students).

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Special Support Grant NOT REPAYABLE

If you are eligible to receive a Special Support Grant you will **not** be eligible to receive a Maintenance Grant.

You may be able to receive a Special Support Grant if you:

- Are a lone parent.
- Have a partner who is also a student and one or both of you is responsible for a child or young person aged under 20 who is in full-time education below higher education level.
- Have a disability, and qualify for the disability premium or severe disability premium.
- Are deaf and qualify for Disabled Students' Allowances.
- Have been treated as incapable of work for a continuous period of at least 28 weeks.
- Have a disability and qualify for income-related Employment and Support Allowance.
- Are from abroad and are entitled to an Income Support Urgent Cases Payment because you are temporarily without funds for a period of up to six weeks.
- Are waiting to go back to a course having taken agreed time out from that course due to an illness or caring responsibility that has now ended.
- Are aged 60 or over.
- Please state on a separate piece of paper which of the above categories you think you may fall into and enclose this, and relevant supporting evidence, with the PR1 form.

The Special Support Grant pays up to £2,906, depending on your household income, and is intended to help with additional course related costs such as books, equipment, travel or childcare. Entitlement is calculated in the same way as the Maintenance Grant but will not affect the amount of Maintenance Loan you may be entitled to receive. Jobcentre Plus or your local authority's Housing Benefit section will not take account of the Special Support Grant when assessing any claim you make for income related benefits.

If you are unsure about your eligibility for a Special Support Grant, call us for help.

Bursaries and Scholarships NOT REPAYABLE

Universities and colleges in England, Wales and Northern Ireland must offer you a mandatory bursary if you are assessed as being eligible to receive either the full Maintenance Grant or full Special Support Grant and the university or college is charging the maximum variable or flexible fee rate.

Some universities and colleges may choose to offer discretionary bursaries or scholarships. The amount offered would be at their discretion and you may not need to be eligible for the full Maintenance Grant or the full Special Support Grant to qualify for their bursary or scholarship scheme.

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Students who started their course in academic year 2005/06 or before (including gap year students who started in 2006/07) may be eligible for the following:

section

Grant for Tuition Fees NOT REPAYABLE

You may not be eligible for a Grant for Tuition Fees if you already hold a UK honours degree unless you are taking a particular vocational degree.

If you are assessed as having to pay a contribution towards your tuition fees then you can apply for a Tuition Fee Loan to cover this assessed contribution, up to a maximum of £1,310.

If you are studying on a postgraduate or equivalent level Initial Teacher Training (ITT) course this grant will be non-income assessed and will be used to help with the amount of tuition fees charged by your university or college, up to a maximum of £1,310.

If you are studying at a private university or college, you are NOT eligible for a Grant for Tuition Fees, unless you are continuing your studies which started before September 2006, in which case you may be eligible for a Grant for Tuition Fees which is non-income assessed.

If you are entitled to any of this grant it will be paid directly to your university or college.

Higher Education (HE) Grant NOT REPAYABLE

There is up to £1,000 HE Grant available depending on your household income. It is not counted by Jobcentre Plus when calculating your other benefits. If you are continuing on a course at a private university or college which you started prior to academic year 2006/07 and this is your first application for student finance, you may be entitled to receive an HE Grant.

If you are still having difficulty choosing which types of financial support you wish to apply for, please refer to the following sources for further information:

- A guide to financial support for higher education students in 2010/11
- Student Loans: A guide to terms and conditions
- Bridging the Gap: a guide to the Disabled Students' Allowances (DSAs) in higher education 2010/11
- Childcare Grant and other support for full-time student parents in higher education 2010/11

All of these booklets as well as all of the application forms are available online at **www.direct.gov.uk/studentfinance**.

You can also get Braille, large-print and audio versions of all forms and guides by calling us on **0845 300 50 90** or by textphone on **0845 604 4434**.

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section 2 personal details

b Contact details

If you provide a term-time correspondence address then all correspondence we issue will be sent to that address from the date you move there.

c Marital status

You are 'living with a partner' if you are sharing a home with your partner but you are not married or in a civil partnership. It does not matter whether you are of the same sex or of opposite sex.

- e If you will be under 25 at the start of the academic year, and you are married or in a civil partnership, please send your original marriage certificate or civil partnership documentation with your application. Your document will be returned to you.
- e If you are separated or divorced, or if you have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from your solicitor confirming your status. Any original documents will be returned to you.
- e If you are widowed or a surviving civil partner, please send the original death certificate.

section 3 about your course and university or college



e Part-time ITT (excluding first degrees)

A part-time undergraduate ITT course is a first degree course. If you are applying for support for a part-time PGCE, part-time Certificate in Education (CertEd) or part-time Diploma in Teaching in the Lifelong Learning Sector (DTLLS) or equivalent course, please tick the 'Part-time ITT' box.

Full-time distance learning

- e If you are studying on a full-time distance learning course for a reason relating to a disability you must send evidence that clearly shows you are unable to attend university or college in person for a reason which relates to your disability.
- f Please send the official letter indicating that you have been offered a state-funded place on a dance and drama course at a privately funded institution.
- g If you have applied, or will be applying, for a social work bursary from the National Health Service Business Services Authority (NHSBSA) you should answer 'no' to this question because this is a separate bursary to those offered by the NHS or the DoH.
 - If you are receiving or are likely to receive an **income assessed** bursary or award, the only element of student finance you are eligible to apply for is the non-income assessed part of the Maintenance Loan and this will be at a reduced rate.
 - If you are receiving or are likely to receive a **non-income assessed** bursary then you are NOT eligible for any other student finance unless you are a seconded student studying a health related course and you have been advised that you cannot apply for any bursary at all, either income or non-income assessed.
 - If you are unsure about your eligibility for a bursary, contact the NHS Pensions Agency Student Grants Unit on 0845 358 6655.
- If your placement is an unpaid placement that is not listed then you will only be entitled to a reduced rate Maintenance Loan.

section 4 your UK bank or building society account details



You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan because this will be paid directly to your university or college and not to you.

loan request section

National Insurance Number

If you do not provide your National Insurance Number, payment of your loan(s) will be withheld and you will have to fund your own tuition fees and living costs until you have resolved this issue.

You will find your National Insurance Number on:

- · Your National Insurance Number card.
- A payslip.
- An income tax document such as a P45 or P60.

If you have never been given a National Insurance Number, you should leave the National Insurance Number box blank. You will be contacted if you need to take any action to obtain a National Insurance Number.

Maintenance Loan

This loan is paid in instalments, directly to you and is to help cover your personal living costs throughout the academic year.

Tuition Fee Loan

This loan is paid directly to your university or college once they confirm your attendance on the course.

Applying for a loan at a later date or changing the amount requested

You can apply for a Maintenance Loan or a Tuition Fee Loan at any time in the academic year provided you are within the time limit. The time limit for applying is usually nine months from the start of your academic year.

To apply for a Maintenance Loan or a Tuition Fee Loan, or to change the amount you originally requested, you can download a Maintenance Loan or Tuition Fee Loan Request form at **www.direct.gov.uk/studentfinance** or contact us on **0845 300 50 90** to have one sent to you.

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section 5 dependent and independent students

- a3 Having the care of a person under the age of 18 means that you look after a child and the child lives with you, irrespective of your relationship with the child.
- Please send the child's/children's original birth certificate(s) and evidence that you have care of the child, for example, evidence that you are receiving Child Benefit or Child Tax Credit.

b Irreconcilable estrangement

You will normally only be considered irreconcilably estranged from your parents if you have had no contact with them for at least a year prior to the start of your academic year.

You will not be able to claim irreconcilable estrangement just because:

- · you do not get on with your parents;
- you do not live with them;
- your parents do not want to give details of their income; or
- your parents choose not to provide you with financial support.

In the legal care of a local authority

If you have at any point been in the custody or care of a local authority but have been back in the legal care of your parents at any time since then, you will not be considered independent.

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Section

section 6 student financial questions

a Unearned income

You may be asked to confirm any estimated income at a later date.

If your actual income is different from your estimated income we will reassess your entitlement to student finance. This may change the level of financial support you receive.

When working out your taxable unearned income you should **not** include:

- earnings from full or part-time work such as holiday work or work you do during term-time;
- any Maintenance Loan or grant payments you may receive;
- payments you receive from your parents under a covenant;
- maintenance payments you expect to receive for your children. These maintenance payments should be included as part of your children's income in question 6d;
- Teacher Training Bursaries;
- Higher Education Bursary (for care leavers);
- bounties paid by the armed services to reservists or disablement or invalidity pensions; or
- ISAs.

b Payments from an employer

You should **only** provide an amount here if you are being released from employment by your employer to attend your course. If this is the case, you should only include salary or wages for days you are actually attending your course and have been released from your employment to do so. Any earnings from salary or wages entered here may affect your student finance entitlement.

Do not provide any amount here if you are a student who is working while studying but have not been specifically released by your employer to attend your course.

d Dependent children

You must include any income the child receives from working, from interest earned on savings, from investments and any maintenance payments you expect to receive for your children as part of **their** income in this question.

The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student or the student's husband, wife or partner, or the student's parents or step-parents. You can find out more information about how household information is calculated in the guide 'Higher education student finance – How you are assessed and paid'.

Please do not include income from sources such as the Government Child Trust, State Child Benefit or minimal sums of money from other sources when entering a child dependant's income.

You must send your child's/children's original birth certificate(s) to confirm their date(s) of birth before they can be taken into account when assessing your entitlement. If you have provided these with a previous application for financial support then you do not need to provide them again.

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section 7 Parents' Learning Allowance, Adult Dependents' Grant and Childcare Grant



- d Fostering or boarding out allowances are regular payments that foster carers receive to meet the costs of keeping a child.
- e Financial commitments to include would be insurance policies such as household or
- medical insurance, life assurance premiums, mortgage repayments or maintenance payments for a dependant. You will have to provide documentary evidence of any obligations you declare.
- If you apply for Childcare Grant or you choose to receive Childcare Grant instead of the childcare element of Working Tax Credit you will be sent a further form to complete and an information booklet outlining the amount of Childcare Grant available. You can get information on all aspects of Working Tax Credit from HM Revenue & Customs (HMRC) helpline on 0845 300 3900.

section 8 about your family



Independent students

For the purpose of income assessment, if you are an independent student, only your partner, if you have one, counts.

If you entered higher education on or after 1 September 2005, your partner is defined as:

- Your husband, wife or civil partner.
- Your opposite or same sex partner, if you are 25 or over and you live with your partner as though you were married or in a civil partnership.

If you do not have a partner as defined above we will only assess your income.

Dependent students

If you are a dependent student, the following family members count for the purpose of income assessment:

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

If you entered higher education **on or after 1 September 2005**, your parent's partner is defined as:

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

If you entered higher education on or after 1 September 2004 but before 1 September 2005 your parent's partner is defined as:

- Your stepmother or stepfather; or
- Your parent's opposite sex partner if they live together as though they were married.
- If your parents are divorced or separated, or if they have been in a civil partnership which has been dissolved, you should send a copy of the decree absolute, dissolution order, or a letter from their solicitor confirming their status.

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Student Declaration

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.

Data Protection

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998.

We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these. The Secretary of State for Business, Innovation and Skills is a joint Data Controller for your information.

If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering.

We may share the information you have given us with other organisations including the Department for Business, Innovation and Skills, other Government bodies and with your university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do.

If you are a returning student your Local Authority may take a role in the processing of your application and will hold information about you for this purpose. For more detailed information about how your application will be processed and with whom your information will be shared and for what purpose, go to **www.direct.gov.uk/studentfinance-dataprotection**.

Changes of circumstance

You must notify SLC (or your LA where appropriate) about any change in your circumstances which may affect your entitlement to financial support.

The most common changes of circumstance for students would be if:

- you are absent from the course for more than 60 days because of illness;
- you are absent for any other reason;
- you leave, abandon or are expelled from the course;
- you stop attending the course and do not intend, or are not allowed, to return for the rest of the academic year;
- you transfer to a different course at the same, or a different, university or college;
- you transfer from a full-time to a part-time course;
- you repeat part or all of a year of your course; or
- the date of the start or end of your course changes.

Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - "bursary administration purposes") they will ask the Secretary of State, your local authority or the Student Loans Company for access to information you provide in connection with this application for student finance (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you **do not** give consent for us to share this information, the payment of any bursary or scholarship to which you may be entitled will be delayed.

Please contact the university or college if you require further information about their bursaries and scholarships.



Part B - Data sharing and you

Any information that we receive about you is kept securely and held strictly under the provisions of the Data Protection Act.

If you have a National Insurance Number but do not provide it, the student(s) you are supporting will only receive student finance which is not based on household income.

Part C - Your financial Details

Please give information for the tax year 2008-09. Normally, this is the year ending 5 April 2009, but may differ if your employer or business has a tax year which does not end in April.

If you are paid in a foreign currency, please state the equivalent in pounds sterling.

What if my income is less in tax year 2010-11 than it was in tax year 2008-09? If you think the total income for your household (before tax) for the tax year 2010-11 will be at least 15% less than it was in tax year 2008-09, still complete this section.

From April 2010, it may be possible for the financial assessment to be calculated using the expected total income for your household in the tax year 2010-11 – a 'current year income assessment'.

- If you are completing this form before April 2010, please give brief details of the expected reduction in income on a separate piece of paper and enclose it with this application. We will then contact you for further information when we can fully assess your household's financial circumstances.
- If you are completing this form after April 2010, you can download a 'Current Year Income Assessment' form from **www.direct.gov.uk/studentfinance** and return it with this application or call on 0845 300 50 90 to have one sent to you.



Please note that a 'current year income assessment' cannot be carried out unless you also provide your financial details for the 2008-09 tax year.

Q3. Income from salary, wages, occupational pensions or taxable state benefits Benefits

Only include income received for the following benefits:

- Bereavement Allowance
- Carer's Allowance
- Contribution based Employment and Support Allowance
- Graduated retirement benefit
- Incapacity Benefit. Only include the amount received after 28 weeks of incapacity.
- Industrial Death Benefit
- Jobseekers Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

| Income Type | Amount (£) | Where to find amount |
|-------------------------------------|------------|--|
| Total salary or wages for the year: | £ | P60 - Pay and income details box |
| Income from taxable state benefits: | £ | P60 - Pay and income details box |
| Occupational Pension: | £ | P60 - Pay and income details box |
| Tips and other payments not on P60: | £ | SA102 E1 Box 3 |
| Directors salary or wages: | £ | P60 - Pay and income details box |
| Total income received: | £ | Write this total figure on the application form. |

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Q4. Income from Self-employment

Income showing on your SA103 and/or SA200 documents

| Income Type | Amount (£) | Where to find amount |
|--|------------|--|
| Total taxable profits from this business (aggregated for multiple Self-employments): | £ | SA103F Box 72 + Box 74 SA103L Box 51 minus Box 52 SA103S Box 27 + Box 29 |
| Profit (Self-employment): | £ | SA200 Box 3.10 |
| Business start up allowance: | £ | SA200 Box 3.6 |
| Total Self-employment income showing on your SA103 and SA200 documents: | £ | Write this total figure on the application form. |

Income stated on SA104 document

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Share of total taxed and untaxed income other than that taxable at 10% and 20%: | £ | SA104F Box 14 + Box 17 + Box 66 + Box 73 minus box 74 |
| Your share of total taxable profit: | £ | SA104S Box 14 + 17 |
| Total Self-employment income showing on your SA104 document: | £ | Write this total figure on the application form. |

Q5. Income from a State Retirement Pension

Non-Lump Sum

| Income Type | Amount (£) | Where to find amount |
|--|--|----------------------------------|
| Total State Retirement Pension (non-lump sum): | £ Write this total figure on the application form. | SA100 TR3 Box 7 or SA200 Box 4.1 |

Lump Sum

| Income Type | Amount (£) | Where to find amount |
|--|--|----------------------|
| Total State Retirement Pension (lump sum): | £ Write this total figure on the application form. | SA100 Box 8 |



Q6. Minister of religion

| Income Type | Amount (£) | Where to find amount |
|---|--|---|
| Total taxable income minus expenses not included in your P60 or P11D: | £ Write this total figure on the application form. | SA102M Box 4 + Box 8 + Box 10 minus (Box 26 + Box 35) |

Q7. Income from savings and investments

Total income showing on your SA100 and SA200 documents or on your bank statements/letters if you were not Self Assessed (SA).

| Income Type | Amount (£) | Where to find amount |
|--|------------|---|
| Dividends from UK companies: | £ | SA100 TR3 Box 3 (Grossed Up) |
| Dividends from unit trusts and open ended investment companies: | £ | SA100 TR3 Box 4 (Grossed Up) |
| Foreign dividends (up to £300): | £ | SA100 TR3 Box 5 |
| UK bank, building society, unit trust etc. interest/amount which has been taxed already (grossed up) plus untaxed UK interest (amounts that have not been taxed at all): | £ | SA100 TR3 box 1 (grossed up) + SA100 TR3 Box 2 or SA200 box 5.1 (grossed) + SA200 box 5.2 |
| UK interest, dividends and other investment income – company dividends (excluding tax credit): | £ | SA200 Box 5.3 |
| Total savings and investment income showing on your SA103 and SA200 documents: | £ | Write this total figure on the application form. |

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Income from savings and investments

Total income showing on your SA101 document

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Stock dividends: | £ | SA101 Ai1 Box 12 (Grossed Up) |
| Non-qualifying distributions and close company loans written off or released: | £ | SA101 Ai1 Box 13 |
| Interest from gilt edged and other UK securities – gross amount before tax: | £ | SA101 Ai1 Box 3 |
| UK life insurance policy etc. gains on where no tax was treated as paid: | £ | SA101 Ai1 Box 6 |
| UK life insurance policy etc. gains from voided ISA's: | £ | SA101 Ai1 Box 8 |
| Life insurance gains – UK life Insurance policy etc.gains on which tax was treated as paid: | £ | SA101 Ai1 box 4 |
| Share schemes – taxable amount: | £ | SA101 Ai2 Box 1 |
| Total savings and investment income showing on your SA101 document: | £ | Write this total figure on the application form. |



Income from savings and investments

Total income showing on your SA104 document

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Total untaxed savings income taxable at 20%: | £ | SA104F Box 33 |
| Taxed income taxable at 10%: | £ | SA104F Box 69 |
| Taxed income taxable at 20%: | £ | SA104F Box 72 |
| Taxed interest: | £ | SA104S Box 26 |
| Total savings and investment income showing on your SA104 document: | £ | Write this total figure on the application form. |

Income from savings and investments

Total income showing on your SA106 document

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Foreign investment income: | £ | SA106 F3 Box 4 |
| Dividend income (foreign) other: | £ | SA106 F3 Box 11 |
| Dividends from foreign companies: | £ | SA106 F3 Box 6 (grossed up) |
| Total savings and investment income showing on your SA106 document: | £ | Write this total figure on the application form. |



Q8. Income from taxable benefits in kind

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Total cash equivalent of fuel for all cars/ vans made available: | £ | P11D Box 10 (Section F & G) |
| Private medical treatment or insurance: | £ | P11D Box 11 |
| Vouchers and credit cards: | £ | P11D Box 12 (Section C) |
| Mileage allowance and passenger payments: | £ | P11D Box 12 (Section E) |
| Assets transferred or placed at employees disposal (cars, property, goods or other assets): | £ | P11D Box 13 (Section A) |
| Assets placed at employees disposal: | £ | P11D Box 13 (Section L) |
| Living accommodation: | £ | P11D Box 14 (Section D) |
| Payments made on behalf of employee: | £ | P11D Box 15 (Section B) |
| Cash equivalent of loans after deducting any interest paid by the borrower: | £ | P11D Box 15 (Section H) |
| Qualifying relocation expenses payments and benefits: | £ | P11D Box 15 (Section J) |
| Services supplied: | £ | P11D Box 15 (Section K) |
| Other items (including subscriptions and professional fees): | £ | P11D Box 15 (Section M) |
| Expenses payments made to, or on behalf of, the employee: | £ | P11D Box 16 (Section N) |
| Total cash equivalent of all cars/vans made available: | £ | P11D Box 9 (Section F & G) |
| Total income from taxable benefits in kind: | £ | Write this total figure on the application form. |



Q9. Income from other taxable income and lump sums

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Other taxable income before expenses and tax taken off (casual earnings, freelance income, business receipts where your business has ceased): | £ | SA100 TR3 Box 15 |
| Foreign earnings not taxable in the UK: | £ | SA101 Ai2 Box 12 |
| Taxable lump sums, excluding redundancy and compensation for loss of job: | £ | SA101 Ai2 Box 3 |
| Lump sums or benefits received from an employer financed retirements benefit scheme: | £ | SA101 Ai2 Box 4 |
| Redundancy and other lump sums and compensation payments: | £ | SA101 Ai2 Box 5 |
| Other income (short return): | £ | SA200 Box 7.1 |
| Total income from other taxable income and lump sums: | £ | Write this total figure on the application form. |

Q10. Income from property lettings

| Income Type Name | Amount (£) | Where to find amount |
|---------------------------------------|------------|--|
| Income from foreign property or land: | £ | SA106 Box 25 |
| Income from UK property: | £ | SA200 Box 6.3 or SA105 Box 36 |
| Total income from property lettings: | £ | Write this total figure on the application form. |



Q11. Income from UK trusts

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Discretionary income payment from a trust (grossed up): | £ | SA107 Box 1 (grossed up) |
| Total payments from settlor-interested trusts: | £ | SA107 Box 2 |
| Foreign estate income: | £ | SA107 Box 22 |
| Non-discretionary income entitlement from a trust - net amount taxed at basic rate (grossed up): | £ | SA107 Box 3 (grossed up) |
| Non-discretionary income entitlement from a trust - net amount taxed at savings rate (grossed up): | £ | SA107 Box 4 (grossed up) |
| Non-discretionary income entitlement from a trust - net amount taxed at dividend rate (grossed up): | £ | SA107 Box 5 (grossed up) |
| Income chargeable on settlors: | £ | SA107 Boxes 13 -14 |
| Income from UK estates grossed up: | £ | SA107 Boxes 16 - 21 (grossed up) |
| Income chargeable on settlors: | £ | SA107 Boxes 7 - 12 (grossed up) |
| Total income from UK trusts: | £ | Write this total figure on the application form. |



Q12. Income from foreign income

| Income Type | Amount (£) | Where to find amount |
|--|------------|--|
| All other overseas income received by an overseas trust, company or other person abroad: | £ | SA106 F3 Box 13 |
| Overseas Pensions etc: | £ | SA106 F3 Box 9 |
| Gains on disposals of holdings offshore funds and discretionary income from non resident trusts: | £ | SA106 F6 Box 41 |
| Benefit received from an overseas trust, company or other person: | £ | SA106 F6 Box 42 |
| Gains on foreign life policies (amount of gain): | £ | SA106 F6 Box 43 |
| Total income from foreign income: | £ | Write this total figure on the application form. |



Q13. Income from an Overseas Pension

| Income Type | Amount (£) | Where to find amount |
|---|------------|--|
| Total amount of unauthorised payment from a scheme, subject to surcharge: | £ | SA101 Ai4 Box 10 |
| Taxable short service refund of contribution (Overseas Pension schemes only): | £ | SA101 Ai4 Box 12 |
| Taxable lump sum death benefit payment (Overseas Pensions only): | £ | SA101 Ai4 Box 13 |
| Value of pension benefits in excess of your available lifetime allowance, taken by you as a lump sum: | £ | SA101 Ai4 Box 5 |
| Amount of unauthorised payment from a pension scheme, not subject to surcharge: | £ | SA101 Ai4 Box 9 |
| Total income from an Overseas Pensions: | £ | Write this total figure on the application form. |

Q14. Income from other overseas income and gains

| Income Type | Amount (£) | Where to find amount |
|--|--|----------------------|
| Amount of omissions (exemptions under transfer of foreign assets): | £ Write this total figure on the application form. | SA106 F6 Box 46 |



Obligations

Q15. Private pension contributions

Do not include any regular payments you are making towards a retirement pension provided by your employer.

| Obligation Type | Amount (£) | |
|--------------------------------|------------|--|
| Private pension contributions: | £ | Write this total figure on the application form. |

Q16. Additional Voluntary Contributions (AVCs)

| Obligation Type | Amount (£) | |
|--|------------|--|
| Additional Voluntary Contributions (AVCs): | £ | Write this total figure on the application form. |

Q17. Allowable expenses on which you claimed tax relief

| Obligation Type | Amount (£) | Where to find amount |
|--|------------|--|
| Total amount of allowable expenses: | £ | SA100 TR3 Box 16 |
| Seafarers earnings deduction: | £ | SA101 Ai2 Box 11 (Deductions) |
| Foreign tax for which tax credit relief not claimed: | £ | SA101 Ai2 Box 13 (Deductions) |
| Business travel and subsistence expenses: | £ | SA102 E1 Box 17 |
| Fixed deductions for expenses: | £ | SA102 E1 Box 18 |
| Professional fee's and subscriptions: | £ | SA102 E1 Box 19 |
| Other expenses and capital allowances: | £ | SA102 E1 Box 20 |
| Allowable expenses: | £ | SA200 Box 2.5 |
| Total amount of allowable expenses: | £ | Write this total figure on the application form. |



Part D - Dependants

Academic Year

You should provide the child dependants' income for the academic year. The academic year is determined by when the student begins their study.

Student's study begins between:

- 1 August 2010 and 31 December 2010 inclusive
- 1 January 2011 and 31 March 2011 inclusive
- 1 April 2011 and 30 June 2011 inclusive
- 1 July 2011 and 31 July 2011 inclusive

Academic Year

- 1 September 2010 to 31 August 2011
- 1 January 2011 to 31 December 2011
- 1 April 2011 to 31 March 2012
- 1 July 2011 to 30 June 2012
- Q1. The child dependant's income is required to assess eligibility for deductions in the calculation of household income for each child that is wholly or mainly financially dependent on the student, the student's husband, wife or partner or the student's parents or step-parents. You can find out more information about how household information is calculated in the booklet 'Higher Education Student Finance How you are assessed and paid'.

Please do not include income from sources such as the Government Child Trust, State Child Benefit or minimal sums of money from other sources when entering a child dependant's income.

Declaration for parents and partners

If any person(s) named in section 9 cannot sign the form it must be signed on their behalf by their 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.

Data Protection Act 1998

The Student Loans Company (SLC) is a Data Controller under the Data Protection Act 1998.

We hold information for the purposes specified in our notification to the Information Commissioner including determining eligibility for student finance, assessing the maximum amount of financial support available, payment of student finance and the detection and prevention of fraud, and may use this information for any of these. The Secretary of State for Business, Innovation and Skills is a joint Data Controller for your information.

If false or inaccurate information is provided and fraud is identified, details may be passed to fraud prevention agencies to prevent fraud and money laundering.

We may share the information you have given us with other organisations including the Department for Business, Innovation and Skills, other Government bodies and with your university or college for these purposes. We may also get information about you from other organisations. If so, it will only be for the purposes described and as the law permits us to do.

For more detailed information about with whom your information will be shared and for what purpose, go to www.direct.gov.uk/studentfinance-dataprotection.

Changes of circumstance

You must notify SLC (or your LA where appropriate) about any change in your circumstances, which may affect the student's entitlement to financial support.

The most common change of circumstance would be if:

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

Information about data sharing for bursary and scholarship purposes

Universities and colleges will be offering financial awards such as bursaries or scholarships to their students. To help them administer these awards (i.e. to determine eligibility and entitlement to, and if relevant pay, a bursary or scholarship - "bursary administration purposes") they will ask the Secretary of State or Student Loans Company for access to information you provide in connection with any application for student finance for academic year 2010/11 (whether on this form or at a later date).

We will share the relevant information with them, unless you indicate that you do not wish us to do so by ticking the box on the declaration. If you do not give consent for us to share this information, the payment of any bursary or scholarship to which the student(s) you are supporting may be entitled will be delayed.