

Higher Education Student Support: confirmation of information about your financial circumstances

PR2

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:

Checklist

Before you send this form to your LEA, please make sure you have done the following:

- Read the notes that came with this form.
- Fully answered all the questions that apply to you. If you have not, this will delay the student's application.
- Signed and dated the relevant declaration.
- Enclosed the relevant documents and evidence.
- Paid the correct postage and written your name and address on the back of the envelope.

Please remember to pay the correct postage fee, which may be more than a first class or second class stamp.

If we need more information or any other documents, your LEA will let you know.

Please read the notes and letter accompanying this form before you complete it, as the information will help you to answer the questions accurately.

This form asks for information about your income. We need this information to help us determine a student's entitlement to student support. This entitlement depends on the student's financial circumstances, which include your income.

Complete this form if you are someone whose income is relevant to the circumstances of a student who has applied for financial support.

Please make sure you are the right person to complete this form on behalf of the student named above. This depends on the year in which the student entered higher education, because the rules for assessing applications depend on this. The notes will help you decide who should complete this form, but if you are in doubt please contact the Student Finance Direct helpline on 08456 077577.

section

1

your and the student's details

If the personal details printed on this form are not correct, please contact the Student Finance Direct Customer Support Office on 08456 077577.

a

Student details

ART ID:

Forename(s):

Surname:

Date of birth: DAY MONTH YEAR

b

Your details

First name: Surname:

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

Place of birth (name of town or village):

If you have an ART ID relating to a student support application of your own, please write it here:

Relationship to student:

section

2

financial details

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

a

Give details of gross income (before deductions) received from 6 April 2004 to 5 April 2005: £

You can find these details on your P60. Send your 2004-05 P60 or other evidence.

b

Taxable benefits in kind: £
Send your P11D for 2004-05 or P2 “notice of coding” for 2005-06.

c

Income from self-employment (estimate if you are not sure): £

d	Income as a company director:	£
e	Income from the state retirement pension:	£
f	Income from any other pensions:	£
g	Income from property, lettings or rents:	£
h	How much of this is through the rent a room scheme?	£
i	Bank and building society gross interest (before tax):	£
j	Other investment income before tax:	
	Type	£
	Type	£
k	Any other type of income:	
	Type	£
	Type	£
l	Income support:	£
m	Income from other benefits. Only include money you get from the following benefits:	£
	<div style="display: flex; flex-direction: column; gap: 5px;"> <div>■ Jobseeker's Allowance</div> <div>■ Bereavement Benefit</div> <div>■ Incapacity Benefit (Only include the amounts received after 28 weeks of incapacity. Ignore anything you get for the first 28 weeks)</div> <div>■ Industrial Death Benefit</div> <div>■ Invalid Care Allowance</div> <div>■ Statutory Maternity Pay</div> <div>■ Statutory Sick Pay</div> <div>■ Widowed Mother's Allowance</div> <div>■ Widow's Benefit</div> </div>	
n	Income from tax benefits, such as Working Tax Credit:	£
	or Child Tax Credit:	£

section

2

continued

financial details

o

Amount of any private pension contributions you have paid:

£

p

Amount of any Additional Voluntary Contributions (AVCs) you have paid:

£

q

Amount of any professional or employment-related expenditure on which you claim tax relief, for example subscriptions to professional organisations, costs of uniforms, and travel expenses:

£

On a separate sheet of paper, please identify any evidence asked for on this form which you cannot supply at this time, and state the reasons for this.

section

3

dependants

Identify any person, other than the student, who will be totally or mainly financially dependent on the person named in section 1b between 1 September 2004 and 31 August 2005.

a

Dependants under 18

Only include income details for persons aged 16 and 17 who are in employment, or unearned income of dependants. Do not count casual earnings of people under 16.

Full name

Date of birth

Income for the year

DAY MONTH YEAR

b

Dependants aged 18 and over in further or higher education

Full name	Date of birth	School, college or university	Course	Are they receiving financial support? If so from which LEA?

Data Protection Act 1998

The following statement describes who will use the information provided on this form and what they will use it for.

We will use the information which you give on this form to process student support applications for persons dependent on you. The Secretary of State for Education and Skills has transferred certain functions relating to student support applications to Local Education Authorities (LEAs) and to Higher Education Institutions (colleges and universities). The Student Loans Company (SLC) also carries out certain functions on her behalf

Your Local Education Authority (LEA) needs the information you give on this form to work out whether students dependent on you are eligible for support and assess the maximum amount of support they are entitled to, and is the data controller for that information. The LEA will make the results of this assessment available to SLC so that it knows how much to pay them. Your LEA will keep your personal information about you so that it can audit its assessment of student support. If you would like to see your information please contact your LEA.

The Student Loans Company (SLC) needs the information you give on this form to process a student's application for support and handle the payments as appropriate, and is the data controller for that information. SLC will have to keep personal information about you for these purposes. The Department for Education and Skills (DfES) is also a data controller for this information as it is responsible for it by law. However, if you would like to see your information please contact SLC. SLC may use your information to maintain or develop its systems.

LEAs and SLC will have shared access to account information to provide customer services to students and to respond to their questions and update information on your account.

The Department for Education and Skills (DfES) may use the information you have provided on this form to monitor the performance of the student support 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) may use the information provided on this form. HEFCE has certain functions under the Further and Higher Education Act 1992 (FHE Act 1992). From time to time, HESA carries out certain functions on behalf of HEFCE. HEFCE will analyse this information together with other information supplied by institutions. HESA and HEFCE will not identify individuals in any published results.

By law, your LEA, SLC and the college or university 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 your application for support unless you sign and date the relevant parts.

Declaration by the parent or parents, husband, wife or partner if they have given information on this form. If the right person cannot sign this form, for whatever reason, it must be signed on his or her behalf by someone who holds a valid Power of Attorney.

- The information I have given on this form is complete and accurate to the best of my knowledge and belief.
- I will tell the LEA immediately if my circumstances change in any way that might affect this entitlement to support.
- I agree to supply any further information that the LEA may ask for.
- I understand that if I give the LEA false information, or do not give the LEA complete information, I may be prosecuted and the financial assistance withdrawn.

Your full name (in block capitals):

Your signature:

Relationship to student:

Date:

DAY

MONTH

YEAR

Notes for completion

Notes for the completion of the Higher education student support: financial form for parents, husband, wife or partner (PR2)

General information

Please complete the attached form PR2 and return it to your Local Education Authority (LEA).

Your LEA will assess the entitlement to support for the academic year, for the students who have applied for support and who are dependent on you. It is important that you read these notes carefully.

Section 2: Financial details

Please give details of income in the financial year ending 5 April 2005. This means income from all sources:

- For the purposes of the Income and Corporation Act 1988, before any personal relief, payments under covenant or deductions are made; and
- From abroad, which is not covered by United Kingdom (UK) tax.

Income before deductions

Please give details of income in the financial year 2004-05. This means your gross taxable income before tax and other deductions. Tell us your income without taking into account any of the following:

- any personal relief;
- payments under covenant;
- deductions for tax, National Insurance, etc.; and
- income on which tax is not payable.

Also tell us about any income you get from abroad, which is not covered by United Kingdom (UK) tax, and about any of the benefits we ask for, if you get them.

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

We will need to see evidence of your earnings, such as:

- your P60;
- your payslips for month 12 or week 53 showing "Total paid to date" for earnings in the 2004-05 financial year;
- a filled-in "Confirmation of Income" (CI2) form; or
- a letter from your employer confirming your earnings.

Provide evidence to support the amount you have written in each box where you have not written "Nil".

Notes for completion

a. Include overtime, bonuses and commission, and any income from employment overseas for the financial year 2004-05.

b. 'Benefits in kind' means things other than money that you get from your employment, and might include a company car, meals or 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 2004 to 5 April 2005.

As confirmation of your income from self-employment you can send the following evidence:

- a filled-in "Confirmation of earnings from self-employment" (GSA1) form; or
- a letter from your accountant.

d. If you are a company director, send your P60, a P11D or independent confirmation of your earnings and director's fees from the company accountant or the Inland Revenue. You can use form GSA1.

e. Please send photocopies of the front pages of your pension books showing your pension payments during the period from 6 April 2004 to 5 April 2005, or a letter signed by Jobcentre Plus. Do not send your current pension or benefit book.

f. Please send a P60 or a letter from your pension provider showing your pension payments during the period 6 April 2004 to 5 April 2005.

j. Tell us the interest you receive before tax. You should not include interest you receive from TESSAs, PEPs and ISAs.

m. Please send a P60U or a letter signed by your Jobcentre Plus to confirm the amount of any benefits or income support you receive. You can also send a filled-in "Confirmation of Benefits" (CB2) form signed by your Jobcentre Plus.

q. Send evidence of pension contributions. The evidence must show that the relief is claimed.

Declaration

You are being asked to complete this form because the student applied for support which depends on your income. You must sign and date this declaration. If you cannot, for whatever reason, it may be signed on your behalf by someone who holds a valid Power of Attorney.