

Application for  
Student Finance  
**2011/12**



This form is also available at  
**[www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance)**

Find us on [facebook.com/SFEngland](https://www.facebook.com/SFEngland) 

Follow us on [twitter.com/sf\\_england](https://twitter.com/sf_england) 



## section 1 finance available


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



- Maintenance Grant
- Special Support Grant
- Maintenance Loan
- Tuition Fee Loan
- Adult Dependants' Grant
- Childcare Grant
- Parents' Learning Allowance
- Disabled Students' Allowances
- Bursaries and Scholarships
- Travel 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 2011/12' or by using our Student Finance Calculator. Both are available from [www.direct.gov.uk/studentfinance](http://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 you need to send can be found in the guidance notes.

If you don't send all the evidence we need with this form, your application may be delayed and you may end up getting less student finance than you are entitled to.

#### Step 1



##### For all students

- Complete sections 2-6.
- 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 14.
- You **do not** need to complete section 6 if you are **only** applying for a Tuition Fee Loan.

 If you **only** want to apply for a Tuition Fee Loan or a reduced rate of Maintenance Loan you can go directly to **Step 5**.

#### Step 2

##### For students who want student finance based on household income

- Complete sections 7 and 8.
- If you think you qualify for the Special Support Grant, please tick this box.  **Tick**  
Detailed information about who can qualify for the Special Support Grant and what evidence needs to be provided can be found in the notes.  

#### Step 3

##### For students who have dependants

- Complete section 9.
- 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 4

##### For students who want student finance based on household income

- Complete section 10.
- Depending on your answers in section 10 you may need to ask your **parent(s) or partner** to provide details about their income in section 11 so we can work out what your full entitlement to student finance will be.

# section 1 finance available

Step  
**5**

## For all students

- Make sure that you read and sign the **Student Declaration** on pages 21/22. If you asked someone to complete section 11, make sure that they have signed **their declarations on page 31**.

## Other student finance available

### Childcare Grant

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:  **Tick**

### 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 application form:  **Tick**

Childcare Grant and DSA application forms can also be downloaded from [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance) or requested by calling us on **0845 300 5090**.

### What if I have further questions?

If you have further questions you can:

- visit [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance)
- refer to 'A guide to financial support for higher education students 2011/12'
- call us on **0845 300 5090** or by textphone on **0845 604 4434**

### When do I need to send you my form?

It is very important we receive this form with all the appropriate evidence by **31 May 2011**. This means you can be confident you will receive your first payment at the start of term.

Please remember if the deadline passes we will do our best to process your application as soon as possible, however 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.

### Where do I send my form?

Return this form to us at Student Finance England, PO Box 210, Darlington, DL1 9HJ.



**Please remember to pay the correct postage.**

## section 2 personal details

### Personal details

a Title

Mr  Mrs  Miss  Ms

Forename(s)

Surname

Sex

Male  Female

Date of birth

 /  / 

Please complete these questions with the details as exactly stated on your birth certificate or passport.

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

Nationality

### Identity evidence details

b Do you hold a UK passport?

Yes  No

You must provide us with evidence of your identity. You can do so in **one** of the following ways:

**(1) Provide the following details from your **UK passport**, which must be **currently valid and not expired** (this is the easiest way for you to verify your identity and means you **do not need to send us your passport**).**

Passport number

Forename(s)

Surname

Date of issue

 /  / 

Date of expiry **n**

 /  / 

**(2) Send your **non-UK passport**. **e****

**(3) Send your original **birth or adoption certificate** and a completed Birth/Adoption Certificate form. **e****

# section 2 personal details

## Previous loans

**c** Have you ever had any other loans from the Student Loans Company (SLC)?

Yes  No

If 'No' go to **e**

If 'Yes', are you behind with the repayments? **n**

Yes  No

**d** Did you receive a loan from the SLC when you were under 18?

Yes  No

If 'No' go to **e**

If 'Yes', have you signed credit agreements for all of them?

Yes  No

## Contact details

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

Home address	Term-time address
<input type="text"/>	<input type="text"/>
Postcode <input type="text"/>	Postcode <input type="text"/>
Home phone number <input type="text"/>	Date on which you will move to this address <input type="text"/> / <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Mobile phone number <input type="text"/>	
Email address <input type="text"/>	

## Marital status

**f** Please tick one box.

Single

Living with a partner

Married/civil partnership **e**  
Please give the date of marriage/civil partnership  
 /  /

Separated **e**

Divorced/dissolved civil partnership **e**

Widowed/surviving civil partner **e**

# section 3 residence

## Nationality

**a1** Are you a UK national? **n e**  Yes  No If 'Yes' [go to b1](#)

**a2** Are you an EU national? **e**  Yes  No

**a3** Are you the child of a Swiss national? **e**  Yes  No If 'Yes' [go to b2](#)

## Residence status

**a4** Are you or your:

- husband, wife, civil partner; or
- parent(s), step-parent; or
- child, son or daughter-in-law, child's civil partner

a European Economic Area (EEA) national or Swiss national who is working, has worked or is looking for work in the UK? **n e**  Yes  No If 'No' [go to a5](#)

If 'Yes', please give details below.  
You should also give details of your previous studies.

If you are currently working, are you going to continue working during your studies?  Yes  No

If 'Yes', please give details. **e**

[go to b2](#)

**a5** Do you have 'settled status' in the UK? **n e**  Yes  No If 'No' [go to a6](#)

If 'Yes', give the date you received this status.  /  /  [go to b2](#)

**a6** Have you or your:

- husband, wife, civil partner; or
- parent(s), step-parent

been granted 'refugee status' by the UK Government? **n e**  Yes  No If 'No' [go to a7](#)

If 'Yes', and if applicable, please give the following:

Home Office reference number

Date this status is due to expire   /   /

[go to b2](#)

# section 3 residence

**a7** Have you or your:

- husband, wife, civil partner; or
- parent(s), step-parent

been granted Humanitarian Protection as a result of a failed asylum application? **ne**

If 'Yes', and if applicable, please give the following:

Home Office reference number

Date this status is due to expire

Yes  No If 'No' go to b2

/  /

go to b2

## Residence history

**b1** In the three years prior to the start of the first academic year of your course, **did you live outside the UK and Islands** at any time?

Yes  No If 'No' go to b3

**b2** Give details of your residence for the three years before the start of the first academic year of your course. **n**

Full address

From  /  /   
To  /  /

Why were you there?

Full address

From  /  /   
To  /  /

Why were you there?

## section 3 residence

- b3** At any time since 1 September 2008 has:
- either of your parents, step-parents, guardians; or
  - your husband, wife, civil partner
- lived or worked outside the UK and Islands or, in the case of an EU, EEA or Swiss national, outside the EEA or Switzerland?
- If 'Yes' please give details.

<input type="checkbox"/>	<b>Yes</b>	<input type="checkbox"/>	<b>No</b>					
Full address								
From	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Why were they there?								
Full address								
From	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Why were they there?								
Full address								
From	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
To	<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Why were they there?								



## section 4 about your course and your university/college

### c Course type (please tick one box)

Full-time undergraduate

Full-time postgraduate Initial Teacher Training (ITT)

Full-time foundation degree

Full-time distance learning

Full-time involving a placement (sandwich course)

Do you have a disability which prevents you from attending your university/college in person?  Yes  No

Yes

No

No

### d Have you been awarded a state-funded place on a dance and drama course at a privately-funded institution? Yes No

Yes

No

### Term details

#### e Where will you live during the academic year 2011/12?

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

# section 4 about your course and your university/college

f Where will you spend most of your time studying in the academic year 2011/12?

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 5**

## Placement details

g Where will your placement be?

If your placement is abroad, have you been accepted onto the ERASMUS exchange scheme?

Placement name and address if known

Abroad     UK     Don't know

Yes     No    If 'Yes' **go to section 5**

Postcode

paid

unpaid

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.

Is the placement

If you ticked 'unpaid' please tick which type

# section 5 previous study and other information

## Previous study

Courses of higher education are those of HNC level or above. Where course details are requested, you should not include A Level/AS Level examinations or equivalent.

**a1** Have you started an undergraduate or postgraduate course of higher education in any country since leaving school? Tick 'Yes' even if you did not complete the course. **n**

Yes  No

If 'No' go to **b**

**a2** Did you achieve a qualification?

Yes  No

If 'No' go to **a4**

**a3** Was the level of the qualification(s) achieved equal to or higher than the level of course you are now applying for? **n**

Yes  No

**a4** Please give course details below. Do not mention any course that you studied part-time where you did not achieve a qualification; or any course that was entirely self-funded at a private university or college where you did not achieve a qualification. **n**


Title of course and qualification achieved	Name of university or college	Town and country of university or college	Date started (MM YYYY)	Date left (MM YYYY)	Did you achieve a qualification
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No

If you did not achieve a qualification for any course listed above, why was this? **e**

## section 5 previous study and other information

### Other information

**b** Are you eligible to apply for any bursary or award, excluding a social work bursary, for the academic year 2011/12 from any of the following?:

- National Health Service (NHS)
- Department of Health (DoH)
- Scottish Government Health Directorate Bursary (Scottish Healthcare Allowance) 

If 'Yes', is this bursary or award income assessed or non-income assessed?

Yes  No

Income assessed

Non-income assessed

## section 6 your UK bank or 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 **n**

  -       - 

### Maintenance Loan **n**

Amount of Maintenance Loan you would like to apply for:

Maximum available to you

 **Tick**

If you wish to apply for less than the maximum available to you, please state the amount

£

### Tuition Fee Loan **n**

Your tuition fee is set by the university or college you go to. You can apply for a Tuition Fee Loan to cover your fees up to a maximum of £3,375. This will be paid directly to your university or college. Find out how much your university or college is charging you before you apply for a Tuition Fee Loan.

I want to apply for a loan to pay the full tuition fee charged by my university or college (up to £3,375).

 **Tick**

I don't want to apply for a loan for the full tuition fee, I only want a loan for

£

### 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

Forename(s)

Surname

Relationship to you

Address

Postcode

Phone number

#### Contact 2

Forename(s)

Surname

Relationship to you

Address

Postcode

Phone number

## section 7 dependent and independent students

This section determines whether you are a dependent or an independent student. This is important as it establishes whose income we need to take into account from your household before we calculate your entitlement.

a1 Will you be 25 or over on the first day of the academic year?

Yes  No

If 'Yes' you are an independent student, **go to section 8**

a2 Have you been married or in a civil partnership at any time before the first day of the academic year?

Yes  No

If 'Yes' you are an independent student, **go to section 8**

a3 Will you have care of a person under the age of 18 on the first day of the academic year? **e n**

Yes  No

If 'Yes', you may be considered an independent student, **go to section 8**

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 (have no contact with) from your parents and this will not change. **n**

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. **n**

Both your parents have died.

You have applied for student finance before, and the parent who was assessed for a contribution has died.

Your parents are living outside the European Union and the assessment of their financial circumstances would place them in jeopardy.

Your parents are living outside the European Union and it would not be reasonably practicable or possible for them to send you money.

**If you 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 boxes above, **go to section 8**

## section 7 dependent and independent students

- c Have you supported yourself financially for a total of three years or more prior to the start of the first academic year of your course? **n**

Yes  No

If 'Yes', you may be considered an independent student. Please give details below.

Name and address of your employer or your benefit office	Did you work full or part-time	From	To	Amount of salary wages or benefit you have received (state whether it was weekly, monthly or yearly) <b>e</b>
		(MM YYYY)	(MM YYYY)	



If you have answered 'No' to all the questions in this section you will be considered a **dependent student**.



## section 8 student financial questions

The academic year is determined by when the student begins their study. Please see page 30 of the guidance notes for academic year dates.

**If you leave any question blank we will not be able to process your application.**

**If a question does not apply to you, please enter 'None' or 'N/A' as the answer.**

### Unearned income

**a** Taxable **unearned** income is any income you receive from the following sources:

- Bank or building society gross interest
- Property, lettings or rent
- Dividends or investments
- Trusts or sponsorships
- Any other payment received for attending the course

Please estimate the total taxable unearned income, before deductions, that you expect to receive in academic year 2011/12. **n**

£

What is the source of this income?

### Payments from an employer

**b** Will your employer be releasing you to attend your course for the academic year 2011/12?

Yes  No

If 'No' go to d

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

£

**c** During the academic year 2011/12, will you or your employer pay any money into a pension fund on your behalf?

Yes  No

If 'Yes', how much during this period?

£

### Dependent children

**d** Give details of any children who will be wholly or mainly financially dependent on you during the academic year 2011/12.

When stating the child's income, include their income from all sources after income tax and National Insurance contributions.

Child's full name	Date of birth <b>e</b> (DD MM YYYY)	Relationship to you	Whom will they live with?	Child's income <b>n</b> (£)



## section 9 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

For further information about Childcare Grant please refer to 'Childcare Grant and other support for full-time student parents in higher education' available at [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance).

**Only complete this section if you are applying for Parents' Learning Allowance, Adult Dependants' Grant or Childcare Grant.**

**a** Are you a lone parent?

Yes  No

If 'Yes' [go to d](#)

**b** Are you under 25, living with a partner and applying for Childcare Grant or Parents' Learning Allowance?

Yes  No

If 'No' [go to d](#)

**c** Give the total estimated income after income tax and National Insurance deductions in the academic year 2011/12 for:

You	Your partner
£ <input type="text"/>	£ <input type="text"/>
You	Your partner
£ <input type="text"/>	£ <input type="text"/>

How much of this will be Child Tax Credit for the academic year 2011/12?

**d** If you are a lone parent and are **not** claiming Adult Dependants' Grant [go to f](#)

Give an estimate of your husband's, wife's, partner's or other adult dependant's income for the academic year 2011/12.

Income from earnings after deductions

Husband, wife or partner	Other adult dependant
£ <input type="text"/>	£ <input type="text"/>

Adoption Agency payments

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

Any disability pension or benefit

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

Child Benefit

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

Guardian's Allowance

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

Fostering or Boarding Out payments **n**

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

Residence Order Allowance

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

Child Tax Credit

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

Working Tax Credit

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

All other income after deductions

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

If other, what is it?

<input type="text"/>	<input type="text"/>
----------------------	----------------------

## section 9 Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

If applying for 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

**e** Give details of financial commitments you have before the start of the course which you, your husband, wife or partner will continue to pay for you during the academic year. **ne**

Type	
£	
Type	
£	
Type	
£	
Type	
£	

**f** **Answer this question if you are applying for Childcare Grant.**

Do you, your husband, wife or partner receive, or expect to receive, the childcare element of Working Tax Credit? **n**

- Yes  No

If 'Yes', you cannot also receive Childcare Grant. But you can choose to receive Childcare Grant **instead** of the childcare element of Working Tax Credit if you wish.

## section 10 about your family **n**

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

If you are an **independent student with a partner**, please read and sign the **Student Declaration** on **pages 21/22** and then pass this form to your partner to complete **section 11**.

If you are a **single independent student**, go to the **Student Declaration** on **pages 21/22**.

**a** Which parent do you normally live, or have more contact with?

What we mean by 'parent', for the purposes of working out your household income can change depending on when you started in higher education. **n**

Mother  Father

or


Both  N/A

**b** What is the marital status of this parent?

- Single
- Living with a partner
- Married/civil partnership
- Separated **e**
- Divorced/dissolved civil partnership **e**
- Widowed/surviving civil partner

Now please read and sign the **Student Declaration** on **pages 21/22** and then pass this form to the person(s) who you have indicated in 'question a' to complete **section 11**.

# Student Declaration

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

This declaration covers all of the student finance available to students for academic year 2011/12.

By signing this declaration you are confirming that you have read the specific terms and conditions about loans, Childcare Grant and Disabled Students' Allowances because they will affect you if you apply for them at any time in academic year 2011/12. If you don't apply for these in academic year 2011/12 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 the Student Loans Company (SLC) 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.
- I understand that if I have provided details of my UK passport, SLC will verify those details with the Identity and Passport Service.

## Loan Contract

- a I have read and understood 'Student loans: A guide to terms and conditions' available at [www.direct.gov.uk/studentfinance](http://www.direct.gov.uk/studentfinance).
- 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.

l 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 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 immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support.

Customer Reference Number

Your full name (in BLOCK CAPITALS)

Your signature

Date

X

### 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 10 must complete section 11 as well as the declaration(s) on page 31. **Please pass this form to them now.**

**If you are a single independent student, please turn to page 35 to finalise your application.**

# section 11 financial details for the tax year 2009-10 for parents and partners

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

In this section of the form you need to tell us some personal details and what your financial income was for the tax year 2009-10. You **must** tell us your 2009-10 income details as we cannot accept amounts from any other tax year. We need your income amounts so we can work out what the student(s) you are supporting are entitled to.

### Quick start guide

Section 11 is divided into 6 parts, this guide gives you a quick summary of each part.

#### Part A

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

#### Part B

Tell us your National Insurance Number.

#### Parts C and D

Answer every question, providing financial information for the tax year 2009-10.

#### Part E

Answer every question, telling us about any income deductions you had during the tax year 2009-10 where appropriate.

#### Part F

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

## What happens if my household income has dropped since tax year 2009-10?

If your household income will be **at least** 15% less than it was in tax year 2009-10 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2011-12 instead of your actual income from tax year 2009-10 when calculating the student's entitlement. However, there must be at least a 15% drop in the **overall household income** (not just your own income) between these two tax years for us to do this and we will ask for evidence of your 2011-12 income at the end of that tax year.

# section 11 financial details for the tax year 2009-10 for parents and partners

## Part A – Your personal details

### Person 1

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth  /  /

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

Home address

Postcode

Home telephone number

Email address

### Person 2

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Date of birth  /  /

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

Home address

Postcode

Home telephone number

Email address

You do not have to disclose your financial information to the student.

If you would like to provide it separately, you can download a Financial Assessment form 2011/12, for parents and partners providing financial details for the first time from [direct.gov.uk/studentfinance.co.uk](http://direct.gov.uk/studentfinance.co.uk) 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

# section 11 financial details for the tax year 2009-10 for parents and partners

## Part B – Data sharing and you

We will share and check the details you give us with HM Revenue & Customs, allowing us to gain the most accurate information possible. This can only be done if you have a valid National Insurance (NI) Number. 

I have an NI Number  Tick

Please provide your NI Number below:

Person 1

 -  - 

Person 2

 -  - 

You are now ready to provide your financial information. Please **go to Part C**

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. Please **go to Part C**

# section 11 financial details for the tax year 2009-10 for parents and partners

## Part C - Your financial information for the tax year 2009-10

### Instructions

- Please give financial details for the tax year from **6 April 2009 to 5 April 2010**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.
- If you answer 'No' to a question, this means you are telling us that you **did not** receive any income from that particular income type in tax year 2009-10.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. **n**
- If any questions are left blank we will not be able to process this application.



**You do not need to send us any evidence.** However, you should keep all of your 2009-10 financial evidence as we may ask for it at a later date to verify the details you have provided.

	<b>Person 1</b>	<b>Person 2</b>
<b>Q1</b> Did you receive Working Tax Credits or Child Tax Credits?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Q2</b> Did you receive Income Support?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>Q3</b> Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>a</b> Total income from salary / wages <b>n</b>	<input type="text" value="£"/>	<input type="text" value="£"/>
<b>b</b> Total income from taxable state benefits <b>n</b>	<input type="text" value="£"/>	<input type="text" value="£"/>
<b>c</b> Total income from occupational pension(s)	<input type="text" value="£"/>	<input type="text" value="£"/>
<b>d</b> Total income from private pension(s)	<input type="text" value="£"/>	<input type="text" value="£"/>
	▼	▼
Total income received	<input type="text" value="£"/>	<input type="text" value="£"/>
<b>Q4</b> Did you receive any income from a state retirement pension? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>a</b> Total non-lump sum amount received	<input type="text" value="£"/>	<input type="text" value="£"/>
<b>b</b> Total lump sum amount received	<input type="text" value="£"/>	<input type="text" value="£"/>

# section 11 financial details for the tax year 2009-10 for parents and partners

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

	Person 1	Person 2
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>a</b> Total <b>interest</b> from UK banks, building societies and unit trusts	£ <input type="text"/>	£ <input type="text"/>
<b>b</b> Total income from UK life insurance gains, securities and partnerships	£ <input type="text"/>	£ <input type="text"/>
<b>c</b> Total income from UK investments and dividends	£ <input type="text"/>	£ <input type="text"/>
<b>d</b> Total income from foreign investment and dividends	£ <input type="text"/>	£ <input type="text"/>

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

	Person 1	Person 2
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>

**Q7** Did you receive any other income during the 2009-10 tax year that you **haven't** yet told us about?

Person 1	Person 2
<input type="checkbox"/> Yes → Go to Part D	<input type="checkbox"/> Yes → Go to Part D
<input type="checkbox"/> No → Go to Part E	<input type="checkbox"/> No → Go to Part E

# section 11 financial details for the tax year 2009-10 for parents and partners

## Part D - Other income

### Instructions

- Complete part D in the same way you completed part C giving financial details for the tax year from **6 April 2009 to 5 April 2010**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. **n**

The notes contain a breakdown of what we want you to include for each question as well as where to find individual amounts on some of the financial documents you might have.

	<b>Person 1</b>	<b>Person 2</b>
<b>Q1</b> Did you receive any income from self-employment? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>a</b> Total taxable profit from businesses	£ <input type="text"/>	£ <input type="text"/>
<b>b</b> Total taxable profit from partnerships	£ <input type="text"/>	£ <input type="text"/>
<b>Q2</b> Did you receive any income as Minister of religion? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total taxable income minus expenses that are not included on your P60 or P11D	£ <input type="text"/>	£ <input type="text"/>
<b>Q3</b> Did you receive any other taxable income or lump sums? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
<b>Q4</b> Did you receive any income from property lettings? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>
<b>Q5</b> Did you receive any income from UK trusts? <b>n</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Total income received	£ <input type="text"/>	£ <input type="text"/>

# section 11 financial details for the tax year 2009-10 for parents and partners

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

**Person 1**  
 Yes  No

**Person 2**  
 Yes  No

Total income received

£

£

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

Yes  No

Yes  No

Total income received

£

£

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

Yes  No

Yes  No

Total income received

£

£

## Part E – Income deductions

### Instructions

- Complete part E in the same way you completed part C giving financial details for the tax year from **6 April 2009 to 5 April 2010**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. **n**

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

**Person 1**  
 Yes  No

**Person 2**  
 Yes  No

Total amount you paid

£

£

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

**Person 1**  
 Yes  No

**Person 2**  
 Yes  No

Total amount you paid

£

£

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

**Person 1**  
 Yes  No

**Person 2**  
 Yes  No

Total amount on which you claimed tax relief

£

£

# section 11 financial details for the tax year 2009-10 for parents and partners

## Part F – Your dependants

Identify any children who will be wholly or mainly financially dependent on you.

### Q1 Child dependants not in further or higher education in academic year 2011/12

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

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

### Q2 Child dependants in further or higher education in academic year 2011/12

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

If the student is your partner, please include any children they named in section 8 of this form if the children have applied for student finance.

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



# Declaration for parents and partners


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

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

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not I understand I might be prosecuted and the student(s) I am supporting may have their financial support withdrawn.
- I agree to supply any further information in relation to the applicant's application for financial support that SLC may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.


<p><b>Person 1</b></p> <p>Your full name (in BLOCK CAPITALS)</p> <input style="width: 100%; height: 20px;" type="text"/> <p>Your signature</p> <div style="border: 1px solid black; padding: 2px; width: 100%; text-align: center; font-size: 2em; font-weight: bold;">X</div> <p>Date</p> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>	<p><b>Person 2</b></p> <p>Your full name (in BLOCK CAPITALS)</p> <input style="width: 100%; height: 20px;" type="text"/> <p>Your signature</p> <div style="border: 1px solid black; padding: 2px; width: 100%; text-align: center; font-size: 2em; font-weight: bold;">X</div> <p>Date</p> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> / <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/> <input style="width: 20px; height: 20px;" type="text"/>
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**Your decision about bursary and scholarship data sharing consent will not affect the student's entitlement to any other financial support available.**


In order for a university or college to determine and pay any bursary or scholarship to which the student(s) you are supporting may be entitled, we will share some of your personal and financial details with them. 

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

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

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.

 **You must now pass this form back to the student.**

## Deadline

It is very important we receive this form with all the appropriate evidence by **31 May 2011**. This means you can be confident the student will receive their first payment at the start of term.

Please remember if the deadline passes we will do our best to process this application as soon as possible, however the first payment may not be available at the start of term.



## Additional notes

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



## Additional notes

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



## Additional notes

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



## Voluntary questions

The following questions are voluntary - you do not have to answer them. Whether or not you answer will not affect our assessment of your entitlement to financial support. If you answer both questions a and b, the information will be used to help the Department for Business, Innovation and Skills develop their policies in the future. Student Finance England will also use your answer to question b to improve their ability to deliver suitable and accessible educational services that meet the varied needs of their communities in the future.

- a Your parents' education** (this includes your natural parents, your adoptive parents, your step-parents, partners of your parents, and your guardians).

Do any of your parents (as defined above) have any higher education qualifications, for example degrees and diplomas or certificates of higher education?

Yes  No  Don't know

- b** How would you describe your ethnic origin?

**White**

British  
 Irish  
 Any other white background

**Black or Black British**

African  
 Caribbean  
 Any other black background

**Mixed**

White and black Caribbean  
 White and black African  
 White and Asian  
 Any other mixed background

**Chinese or other ethnic group**

Chinese  
 Any other

**Asian or Asian British**

Indian  
 Pakistani  
 Bangladeshi  
 Any other Asian Background

# Checklist

Before you return this form please make sure that:



You have answered all the questions that apply to you

Tick



You have checked the declaration(s) are **signed** and **dated**

Tick



**You have included all the evidence we need with this form**

Tick



If you don't send all the evidence we need, your application may be delayed and you may end up getting **less** student finance than you are entitled to.



**Remember, you don't need to send your UK passport** as proof of your identity because **we only need your UK passport details** in section 2. If you send your passport it may take several weeks before we can return it to you.

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.

**You must return your completed form to the address shown below.**

**Student Finance England**

**PO Box 210**

**Darlington**

**DL1 9HJ**

## Deadline

It is very important we receive this form with all the appropriate evidence by **31 May 2011**. This means you can be confident you will receive your first payment at the start of term.

Please remember if the deadline passes we will do our best to process your application as soon as possible, however 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.