sfe

student finance england

PFF2

Assessment of Financial Circumstances For parents and partners of students

2019/20

SFE/PFF2/1920/A

facebook.com/SFEngland twitter.com/sf_england

Who should complete this form?

Complete this form if you are:

- The student's natural or adoptive parent
- The student's step-parent
- The husband, wife, civil partner or cohabiting partner of one of the student's parents
- The student's husband, wife or civil partner
- The student's partner, if the student is over 25 and you live with them as though you are married or in a civil partnership.

What details do I need to provide?

You need to tell us some personal details and what your financial income was for the tax year 2017-18. You **must** tell us your 2017-18 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.

To find out how we'll use the information you provide go to **www.gov.uk/studentfinance** to read our Privacy Notice before completing this form.

The student 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. For more information about this, read our Privacy Notice.

How do I complete this form?

This form is made up of 6 sections:

section 1 - personal details

section 2 - data sharing and you

section 3 - your financial information for tax year 2017-18

section 4 - other income

section 5 - income deductions

section 6 - your dependants

- Start by checking the details in section 1 and then work your way through the form. (Depending on your circumstances you may not need to complete every section)
- Please refer to the support notes at the back of this form each time you see n
- You need to send evidence whenever you see this icon e

What if I have further questions?

If you have further questions you can:

- visit **www.gov.uk/studentfinance**
- call us on **0300 100 0607**

What happens if my household income has dropped since tax year 2017-18?

If your household income has dropped by 15% since tax year 2017-18 you can apply for a 'Current Year Income Assessment'. This means we would use your expected income for tax year 2019-20 instead of your actual income from tax year 2017-18 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 2019-20 income at the end of that tax year. Please refer to the support notes at the back of this form for more information.

Section 1 Personal details

a Student's details

Customer Reference Number

Forename(s)

Surname

Date of birth (DDMMYYYY)

b Your personal details

Person 1

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Sex Male Female

What is your current marital status?

Single

Married/civil partnership

Divorced/dissolved civil partnership e

Living with a partner

Separated e

Widowed/surviving civil partner e

Person 2

Your Customer Reference Number
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Sex Male Female

What is your current marital status?

Single

Married/civil partnership

Divorced/dissolved civil partnership e

Living with a partner

Separated e

Widowed/surviving civil partner e

Section 1 Personal details

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

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 your partner. If you would like to provide your information separately you can download another copy of this form.

Section 2 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 financial information possible. This can only be done if you have a valid National Insurance (NI) number.

Person 1

I have an NI number ☐ Tick

Please provide your NI number below:

☐☐-☐☐☐☐☐☐-☐

You are now ready to provide your financial information.

go to section 3

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 section 3

Person 2

I have an NI number ☐ Tick

Please provide your NI number below:

☐☐-☐☐☐☐☐☐-☐

You are now ready to provide your financial information.

go to section 3

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 section 3

Section 3 Your financial information for tax year 2017-18

Instructions

- Please give your financial details for the tax year from **6 April 2017 to 5 April 2018**.
- 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 2017-18.
- 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 2017-18 financial evidence as we may ask for it at a later date to verify the details you have provided.

Financial details

	Person 1	Person 2
Q1 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions?	☐ Yes ☐ No	☐ Yes ☐ No
a Total income from salary/wages	£	£
b Total income from taxable state benefits	£	£
c Total income from occupational pension(s)	£	£
d Total income from private pension(s)	£	£
Q2 Did you receive any income from a state retirement pension?	☐ Yes ☐ No	☐ Yes ☐ No
a Total lump sum amount received	£	£
b Total non-lump sum amount received	£	£
Q3 Did you receive any income from savings and investments?	☐ Yes ☐ No	☐ Yes ☐ No
a Total **interest** from UK banks, building societies and unit trusts	£	£
b Total income from UK life insurance gains, securities and partnerships	£	£
c Total income from UK investments and dividends	£	£
d Total income from foreign investment and dividends	£	£
Total income received	£	£

Section 3 Your financial information for tax year 2017-18

	Person 1	Person 2
Q4 Did you receive any taxable benefits in kind? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£

Any other income

	Person 1	Person 2
Q5 Did you receive any other income during the 2017-18 tax year that you **haven't** yet told us about?	☐ Yes — **Go to section 4** ☐ No — **Go to section 5**	☐ Yes — **Go to section 4** ☐ No — **Go to section 5**

Section 4 Other income

Instructions

- Complete section 4 in the same way you completed section 3 giving gross financial details for the tax year from **6 April 2017 to 5 April 2018**.

  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.

	Person 1	Person 2
Q1 Did you receive any income from self-employment? n	☐ Yes ☐ No	☐ Yes ☐ No
a Total adjusted profit from businesses	£	£
b Total adjusted profit from partnerships	£	£
Total income received	£	£
Q2 Did you receive any income as a Minister of religion? n	☐ Yes ☐ No	☐ Yes ☐ No
Total taxable income minus expenses that are not included on your P60 or P11D?	£	£
Q3 Did you receive any other taxable income or lump sums? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q4 Did you receive any income from property lettings? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£

Section 4 Other income

	Person 1	Person 2
Q5 Did you receive any income from UK trusts?	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q6 Did you receive any foreign income?	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q7 Did you receive any income from an overseas pension?	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q8 Did you receive any other overseas income and gains?	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£

Section 5 Income deductions

Instructions

- Complete section 5 in the same way you completed section 3 giving gross financial details for the tax year from **6 April 2017 to 5 April 2018**.

	Person 1	Person 2
Q1 Did you pay any private pension contributions?	☐ Yes ☐ No	☐ Yes ☐ No
Total amount you paid	£	£
Q2 Did you pay any Additional Voluntary Contributions (AVCs)?	☐ Yes ☐ No	☐ Yes ☐ No
Total amount you paid	£	£
Q3 Did you have any allowable expenses on which you claimed tax relief?	☐ Yes ☐ No	☐ Yes ☐ No
Total amount on which you claimed tax relief	£	£

Section 6 Your dependants n

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 2019/20 n

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.

If you require more space please use the additional notes section on page 10.

Full name

Date of birth (DDMMYYYY)

Income for the year

Full name

Date of birth (DDMMYYYY)

Income for the year

Q2 Child dependants in further or higher education in academic year 2019/20

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.

If you require more space please use the additional notes section on page 10.

Full name

Date of birth (DDMMYYYY)

School, college or university

Course

Are they receiving financial support? If so, from which authority or organisation?

Do you want to support this student's application for student finance?

☐ Yes ☐ No

Full name

Date of birth (DDMMYYYY)

School, college or university

Course

Are they receiving financial support? If so, from which authority or organisation?

Do you want to support this student's application for student finance?

☐ Yes ☐ No

Declaration

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

- I confirm that to the best of my knowledge and belief, the information I have provided is true and complete. If it is not I understand the student(s) I am supporting may have their financial support withdrawn and I could be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that the Student Loans Company (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.

Person 1

Your full name (in BLOCK CAPITALS)

Your signature

X

Today's date (DDMMYYYY)

☐☐ / ☐☐ / ☐☐☐☐

Person 2

Your full name (in BLOCK CAPITALS)

Your signature

X

Today's date (DDMMYYYY)

☐☐ / ☐☐ / ☐☐☐☐

Make sure you sign the declaration in ink. Digital signatures won't be accepted.

Where do I send my form?

Once you have completed this form and signed and dated the declaration, please return it to:
Student Finance England
PO Box 210
Darlington
DL1 9HJ

Please remember to pay the correct postage.

Additional notes

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

Support notes

Notes

What happens if my household income has changed since tax year 2017-18?

If your total household income (before tax) for the tax year 2019-20 will be at least 15% less than it was in tax year 2017-18, still complete this section as well as completing a 'Current Year Income Assessment Form'.

You can download the form at **www.sfengland.slc.co.uk/currentyearincome** and return it with this application or contact us on 0300 100 0607 to have one sent to you.

Please note that a current year income assessment cannot be carried out unless you provide your financial details for the 2017-18 tax year.

Section 1 Personal details

Marital Status

Send a copy of one of the following evidence items. If we have already accepted evidence you sent in support of a previous application for this student you do not need to send any further documents. You will only need to provide evidence if you haven't done so previously or if your circumstances have changed.

- Decree absolute
- Decree nisi
- Dissolution order
- Most recent council tax bill showing a 25% single occupancy discount
- A letter from your solicitor confirming your status
- Certified copy of a death certificate

Section 2 Data sharing and you

We will check the financial information that you provide with HM Revenue & Customs. This information will be kept securely and held strictly under the provisions of the applicable data protection legislation in the UK.

If you fail to provide your National Insurance (NI) number on the application form we will ask you to provide copies of your financial documents.

If your NI number is shown on any documents you send us in support of an application, we will use this information and share and check it with HM Revenue & Customs in order to obtain accurate financial information about you.

Section 3 Your financial information for tax year 2017-18

Please give financial information for tax year 2017-18. Normally, this is the year ending 5 April 2018, but may differ if your employer or business has a tax year which does not end in April.

For any income paid in a foreign currency, please state the equivalent in pounds sterling.

Q1 Income from salary, wages, taxable state benefits or from occupational or private pensions

You should refer to your 2017-18 P60 or final payslip for your income for salary/wages. If as part of your salary or wages for tax year 2017-18 you received **tips and other payments** that did not show on your P60, you still need to include this figure when providing your total income amount earned from employment. If you declared this type of income to HM Revenue & Customs you would have done so by completing Box 3 on Page E1 for the 2017-18 SA102 (Employment) Form.

b Taxable state benefits

You should refer to your 2017-18 P60 or P45 from the Department of Work and Pensions for your taxable state benefit details. 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

Don't include income from any other benefits, including Universal Credit.

Occupational/private pension

If you received an occupational or private pension, you should refer to your P60P or annual statement from your pension provider.

Q2 Income from a state retirement pension

If you are Self Assessed

Online tax return

You would have been asked what your state retirement pension income amounts were as part of your self-assessment. You should refer to your saved online tax return for these income figures.

Paper tax return

The locations of where to find these income types on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 4.1 (non-lump sum amount only – if you completed an SA200 you would not have had a lump sum pension payment)

Full paper tax return - SA100 TR3 Box 8, SA100 TR3 Box 9

Q3 Income from savings and investments

To make this question easier to answer, we have split it up into 4 separate parts. You may or may not have received income from every part, just tell us about the ones you did.

Only tell us about the amount of interest/income you gained from savings and investments during the 2017-18 tax year, not the actual amount of savings or invested sums you had.

a Income from UK banks, building societies and unit trusts

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

Gross UK interest (before tax has been deducted)

You must include interest you receive on bank, building society and other savings accounts unless specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

If you did not declare any savings and investment income to HMRC

Please refer to your bank or building society statements for these figures.

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 5.2

Full paper tax return - SA100 TR3 Box 2

Section 3 Your financial information for tax year 2017-18

b Income from UK life insurance gains, securities and partnerships

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

Interest from gilt edged and other UK securities – gross amount before tax

UK life insurance policy etc. gains on which tax was treated as paid

UK life insurance policy etc. gains on where no tax was treated as paid

UK life insurance policy etc. gains from voided ISAs

Your share of taxed interest etc.

Total untaxed savings income taxable at 20%

Taxed income taxable at 10%

Taxed income taxable at 20%

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return -	If you completed a short paper return you would not have had any income from UK life insurance gains, securities and unit trusts.
Full paper tax return -	SA101 Ai1 Box 3, SA101 Ai1 Box 4, SA101 Ai1 Box 6, SA101 Ai1 Box 8, SA104S Box 28, SA104F Box 35, SA104F Box 70, SA104F Box 73

c Income from UK investments and dividends

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

Dividends from UK companies

Other dividends

Stock Dividends

Non-qualifying distributions and close company loans written off or released

Share schemes – taxable amount

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return -	SA200 Box 5.3
Full paper tax return -	SA100 TR3 Box 4, SA100 TR3 Box 5, SA101 Ai1 Box 12, SA101 Ai1 Box 13, SA101 Ai2 Box 1

d Income from foreign investment and dividends

Tell us about the amount of interest/income you received from the following savings and investment income type(s):

Foreign dividends (up to £300)
Interest and other income from overseas savings
Dividends from foreign companies
Dividend income received by a person overseas

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from foreign investment and dividends.

Full paper tax return - SA100 TR3 Box 6, SA106 Box 4, SA106 F3 Box 6, SA106 F3 Box 11

Q4 Income from taxable benefits in kind

P11D

The following table provides a breakdown of what we want you to include as part of your total income from 'taxable benefits in kind' during the 2017-18 tax year. Add together all the benefits in kind you received and write your total figure on the form.

Benefit in kind	Where to find amount on your P11D
Assets placed at employees disposal (cars, property, goods or other assets)	(Section A) Box 13
Payments made on behalf of employee	(Section B) Box 15 (Total sum of both boxes)
Vouchers and credit cards	(Section C) Box 12
Living accommodation	(Section D) Box 14
Mileage allowance and passenger payments	(Section E) Box 12
Total cash equivalent of all cars/vans made available	(Section F) Box 9 plus (Section G) Box 9
Total cash equivalent of fuel for all cars/vans made available	(Section F) Box 10 plus (Section G) Box 10
Cash equivalent of loans after deducting any interest paid by the borrower	(Section H) Box 15
Private medical treatment or insurance	(Section I) Box 11
Qualifying relocation expenses payments and benefits	(Section J) Box 15
Services supplied	(Section K) Box 15
Assets placed at employees disposal	(Section L) Box 13
Other items (including subscriptions and professional fees)	(Section M) Box 15 (Total sum of all boxes)
Expenses payments made to, or on behalf of, the employee	(Section N) Box 16 (Total sum of all boxes)

Section 4 Other income

Q1 Income from self-employment

To make this question easier to answer, we have split it up into 2 parts. You may or may not have received self-employment income from both parts, just tell us about the ones you did.

a Total adjusted profit for businesses

You should include the income type below as your answer for the total amount of adjusted profits you received from self-employment during the 2017-18 tax year.

Total adjusted profits from this business (aggregated for multiple self employments)

If you are Self Assessed

Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

Short paper tax return -	SA200 Box 3.9
Full paper tax return -	SA103F (Box 73 plus Box 75) or SA103S (Box 28 plus Box 30) or SA103L (Box 49 minus Box 50)

b Total adjusted profit from partnerships

You should include the income type(s) below as your answer for the total adjusted profit you received from partnerships during the 2017-18 tax year.

Share of total taxed and untaxed income other than that taxable at 10% and 20%

Your share of total adjusted profit from the partnerships

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) and how to work this amount out are detailed below:

Short paper tax return -	If you completed a short paper return you would not have had any self-employment income from partnerships.
Full paper tax return -	SA104F (Box 16 plus Box 19 plus Box 67 plus Box 74 minus Box 75), SA104S (Box 16 plus Box 19)

Section 4 Other income

Q2 Minister of religion

Tell us about the amount of income you received from the following income type during the 2017-18 tax year:

Taxable income minus expenses (Ministers of religion) that are not included in your P60 or P11D

If you are Self Assessed

Online tax return

You would have been asked this question as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed SA102M tax form and how to work this amount out are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from working as a Minister of religion.

Full paper tax return - SA102M (Box 4 plus Box 8 plus Box 10 minus (Box 26 plus Box 35)

Q3 Other income and lump sums

You should include the income type(s) below as your answer for the amount of income you received from other income and lump sums.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Other taxable income - before expenses and tax taken off

Foreign earnings not taxable in the UK

Taxable lump sums

Any redundancy payments or compensation for loss of job

Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 7.1

Full paper tax return - SA100 TR3 Box 17, SA101 Ai2 Box 12, SA101 Ai2 Box 3, SA101 Ai2 Box 4, SA101 Ai2 Box 5, SA101 Ai2 Box 9

Section 4 Other income

Q4 Income from property lettings

You should include the income type(s) below as your answer for the amount of income you received from property lettings.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Income from UK property

Income from foreign property or land

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 6.3

Full paper tax return - SA105 Box 13 and 38, SA106 Box 25

Q5 Income from UK trusts

You should include the income type(s) below as your answer for the amount of income you received from UK trusts.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Discretionary income payment from a UK resident trust - net amount

Discretionary income payment from a UK resident trust - total payments from settlor-interested trusts

Non-discretionary income entitlement from a trust – net amount of non-savings income

Non-discretionary income entitlement from a trust – net amount of savings income

Non-discretionary income entitlement from a trust – net amount of dividend income

Income chargeable on settlors

Income from UK estates

Foreign estate income

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed SA107 tax form and how to work out these amounts are detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from UK trusts.

Full paper tax return - SA107 Box 1, SA107 Box 2, SA107 Box 3, SA107 Box 4, SA107 Box 5 SA107 total sum of (Boxes 7 to 14), SA107 total sum of (Boxes 16 to 21), SA107 Box 22

Section 4 Other income

Q6 Foreign income

You should include the income type(s) below as your answer for the amount of income you received from foreign income.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Total taxable amount of overseas pensions, social security benefits and royalties etc.

Total taxable amount of all other income received by a person abroad and any remitted 'ring fenced' foreign income

Gains on disposals of holdings offshore funds and discretionary income from non-resident trusts

Benefit received from an overseas trust, company or other person

Gains on foreign life policies (amount of gain)

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed SA106 tax form are detailed below:

Short paper tax return -	If you completed a short paper return you would not have had any foreign income.
Full paper tax return -	SA106 F3 Box 9, SA106 F3 Box 13, SA106 F6 Box 41, SA106 F6 Box 42, SA106 F6 Box 43

Q7 Income from an overseas pension

You should include the income type(s) below as your answer for the amount of income you received from an overseas pension.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Value of pension benefits in excess of your Available Lifetime Allowance, taken by you as a lump sum

Amount of unauthorised payment from a pension scheme, not subject to surcharge

Total amount of unauthorised payment from a pension scheme, subject to surcharge

Taxable short service refund of contribution (overseas pension schemes only)

Taxable lump sum death benefit payment (overseas pensions only)

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed SA101 tax form are detailed below:

Short paper tax return -	If you completed a short paper return you would not have had any income from an overseas pension.
Full paper tax return -	SA101 Ai4 Box 7, SA101 Ai4 Box 13, SA101 Ai4 Box 14, SA101 Ai4 Box 16, SA101 Ai4 Box 17

Section 4 Other income

Q8 Other overseas income and gains

You should include the income type below as your answer for the amount of income you received from other overseas income and gains.

Add together the income types below that you received during the 2017-18 tax year and tell us your total figure on the form. You may not have received income from every income type listed, just tell us about the ones you did.

Amount of omissions (exemptions under transfer of foreign assets)

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The location of where to find this figure on your completed SA106 tax form is detailed below:

Short paper tax return - If you completed a short paper return you would not have had any income from other overseas income and gains.

Full paper tax return - SA106 F6 Box 46

Section 5 Income deductions

Q3 Allowable expenses on which you claimed tax relief

The list below is a breakdown of what we want you to include in your answer for the amount of allowable expenses you had on which you claimed tax relief.

Add together all allowable expenses below which you had during the 2017-18 tax year and tell us your total figure on the form. You may not have had all the allowable expenses listed, just tell us about the ones you did.

Total amount of allowable expenses
Foreign tax for which tax credit relief not claimed
Business travel and subsistence expenses
Fixed deductions for expenses
Professional fees and subscriptions
Other expenses and capital allowances
Seafarers' earnings deduction

If you are Self Assessed

Online tax return

You would have been asked these questions as part of your assessment. You should refer to your saved online tax return for these individual figures.

Paper tax return

The locations of where to find these individual figures on your completed tax form(s) are detailed below:

Short paper tax return - SA200 Box 2.5

Full paper tax return - SA100 TR3 Box 18, SA101 Ai2 Box 13, SA102 E1 Box 17, SA102 E1 Box 18, SA102 E1 Box 19, SA102 E1 Box 20, SA101 Ai2 Box 11

Section 6 Your dependents

Academic year

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

Student's study begins between	Academic year
1 August 2019 and 31 December 2019 inclusive	1 September 2019 to 31 August 2020
1 January 2020 and 31 March 2020 inclusive	1 January 2020 to 31 December 2020
1 April 2020 and 30 June 2020 inclusive	1 April 2020 to 31 March 2021
1 July 2020 and 31 July 2020 inclusive	1 July 2020 to 30 June 2021

Q1 The child dependant's income is required to assess the eligibility for the 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 by visiting **www.gov.uk/studentfinance**

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

Declaration

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

You must notify Student Finance England about any change in your circumstances, which may affect the student's entitlement to financial support.

The most common change of circumstances 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 2019/20 (whether on this form or at a later date).