studentfinanceni

Application for Student Finance for continuing students 2024/25

PR1 Form

You can apply online at **www.studentfinanceni.co.uk**

Your forename(s)

Your surname

You should complete this form if you are continuing study on one of the following courses:

- A full-time or sandwich course of higher education
- A full-time Initial Teacher Training (ITT) course
- A part-time ITT course
- A flexible ITT course that lasts at least six weeks
- A diploma or degree course in a health related discipline and you are eligible to apply for an **income assessed** bursary from the National Health Service (NHS) or the Department of Health (DoH) or the Student Awards Agency Scotland (SAAS).

We have provided guidance notes to help you so please refer to these each time you see this icon. n

You will have to send evidence with your application whenever you see this icon. e **Details about the evidence can be found in the guidance notes.**

When do I send my form?

To make sure you receive your first payment at the start of term, you **must** return this form and all of the evidence we need by **28 June 2024.**

We will do our best to process your application as soon as possible, however if the deadline date has passed, your first payment may not be ready for the start of term.

If your application form is returned more than 9 months from the start of your academic year it won't be processed, and you may lose your full entitlement to student finance for this academic year.

To find out how we'll use the information you provide go to **www.studentfinanceni.co.uk/privacy-notice** to read our Privacy Notice before completing this form.

You 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 you may be entitled, we will share some of your personal, financial and course details as well as information about your eligibility for student finance with them. For more information about this, read our Privacy Notice.

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

Section 1 - finance available

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

- Maintenance Grant
- Special Support Grant
- Maintenance Loan
- Tuition Fee Loan
- Student Contribution Loan
- Adult Dependants' Grant
- Parents' Learning Allowance
- Bursaries and Scholarships
- Travel Grant
- Childcare Grant
- Disabled Students' Allowance

You can find more detailed information on what is available and what you might be entitled to at **www.studentfinanceni.co.uk**

What if I have questions?

If you have questions you can:

- visit **www.studentfinanceni.co.uk**
- call us on **0300 100 0077**

Where do I send my form?

You must return your completed form to your local Student Finance NI (SFNI) office. You can find their address at **www.studentfinanceni.co.uk**

Remember to pay the correct postage or we may not receive your form.

Section 1 - finance available

Continued

You can apply in 5 easy steps
Depending on your circumstances you may not need to complete all of the steps.

1

For all students

- Complete sections 2-4.
- Remember if you are applying for a loan you need to tell us how much you want by completing the loan request section on page 12.
- You do **not** need to complete section 4 if you are **only** applying for a Tuition Fee Loan.

! After you've completed Step 1 and if you **only** want to apply for a Tuition Fee Loan or a Maintenance Loan not based on household income you can go to **Step 5**.

2

For students who want student finance based on household income

- Complete sections 5 and 6.

☐ If you think you qualify for Special Support Grant, please tick this box.

Detailed information about who can qualify for Special Support Grant and what evidence needs to be provided can be found in the notes.

3

For students who have dependants

- Complete section 7.
- You should complete this section if you have any children or adult dependants and want to apply for financial help in relation to them.

! If you are a single independent student you should now go to **Step 5**.

Section 1 - finance available

Continued

4

For students who want student finance based on household income

- Complete section 8.
- Depending on your answers in section 8 you may need to ask your parent(s) or partner to provide details about their income in section 9 so we can work out what your full entitlement to student finance will be.
- If you do not wish to apply for student finance based on household income, your parent(s) or partner do not need to complete section 9.

5

For all students

- Make sure that you read and sign the **terms and conditions on pages 19 and 20.**

  If you asked someone to complete section 9, make sure that they have signed **their declaration(s) on page 29.**

Other student finance available

Childcare Grant (CCG)

If you want to apply for CCG you'll need to:
- complete and return this form **and**
- complete an Application For Help With Childcare Costs (CCG1).

You can download the CCG1 form at: **www.studentfinanceni.co.uk**

Disabled Students' Allowance (DSA)

If you want to apply for DSA you'll need to:
- complete and return this form **and**
- complete a Disabled Students' Allowance Application Form (DSA slim).

You can download the DSA slim form at: **www.studentfinanceni.co.uk**

Section 2 - personal details

Customer Reference Number

Personal details

a

Title ☐ Mr ☐ Mrs ☐ Miss ☐ Ms

Forename(s)

Surname

Any previous names you may be known by

Sex ☐ Male ☐ Female

Date of birth Day Month Year

Contact details

b

All correspondence we issue will be sent to your contact address. You can update your address at any time by logging into your online account or by calling us. n

Contact address

Postcode

Contact phone number

Mobile phone number

Email address

Current relationship status

c

Tick one box below to show your status. Only send evidence if this has changed since your last application.

☐ Single (never married/civil partnership and not living with a partner)

☐ Living with a partner n

☐ Married/civil partnership → Please give the date of marriage/civil partnership Day Month Year e

☐ Separated e

☐ Divorced/dissolved civil partnership e

☐ Widowed/surviving civil partner e

Section 2 - personal details

Continued

Armed Forces

d1 Are you a member of the Armed Forces serving outside Northern Ireland? n e ☐ Yes ☐ No

d2 Are you a family member of someone in the Armed Forces serving outside Northern Ireland? n e ☐ Yes ☐ No
(For example: spouse or child)

Section 3 - about your course and your university or college

a **Full** tuition fee amount for this academic year £
Please remember your tuition fee amount can change each academic year. If you are unsure about the tuition fee amount you'll be charged, speak to your university or college.

b Is this the final year of your course? ☐ Yes ☐ No

c Will you be studying at exactly the same university or college and on exactly the same course that you were in academic year 2023/24? ☐ Yes ☐ No if 'Yes' **go to e2**

If any of your course or university or college details have changed **in any way** since you applied for student finance in the last academic year, you must complete all the questions in this section with the **new** details.

Section 3 - about your course and your university or college

Continued

d **University or college details**

University or college name and address

Postcode

UCAS personal identification number

UCAS university or college code

UCAS campus code (if applicable)

Course details

e1 Course name

If you are following a combined studies or modular course, please list all subjects being studied

UCAS course code

Qualification you expect to gain (for example, BSc Physics)

Course start date — Month Year

Course end date — Month Year

Course length (years)

Section 3 - about your course and your university or college

Continued

e2

Year of course n

- ☐ Foundation
- ☐ First year
- ☐ Second year
- ☐ Third year
- ☐ Fourth year

Other (give details)

If the course is franchised to another university or college, give their address below

Postcode

f

Course type (please tick one box):

- ☐ Full-time undergraduate

Initial Teacher Training (ITT) courses

- ☐ Flexible postgraduate ITT
- ☐ Part-time undergraduate ITT
- ☐ Part-time ITT n (excluding first degrees)
- ☐ Full-time postgraduate ITT

Answer both questions

Number of weeks you will be studying full-time in this academic year.

Number of weeks you will be on full-time teaching practice in this academic year.

Other course types

- ☐ Full-time distance learning
- ☐ Full-time foundation degree
- ☐ Full-time involving a placement (sandwich course)

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

Section 3 - about your course and your university or college

Continued

g1 In this academic year, are you eligible to apply for a bursary, excluding social work bursary, from any of the following? n

- National Health Service (NHS)
- Department of Health (DoH)
- Student Awards Agency Scotland (SAAS)

☐ Yes ☐ No

g2 If 'Yes', is this bursary: n

☐ Income assessed
☐ Non-income assessed

Term details

h Where will you live during this academic year?

Term 1	☐ Living with parent(s)	☐ Elsewhere or own home
Term 2	☐ Living with parent(s)	☐ Elsewhere or own home
Term 3	☐ Living with parent(s)	☐ Elsewhere or own home

i Where will you spend most of your time this academic year? n

Term 1	☐ University or college	☐ Study abroad	☐ Work placement
Term 2	☐ University or college	☐ Study abroad	☐ Work placement
Term 3	☐ University or college	☐ Study abroad	☐ Work placement

if you have ticked 'University or college' for all 3 terms **go to section 4**

Section 3 - about your course and your university or college

Continued

j1 Will you be undertaking a placement as part of the Erasmus+ exchange programme? ☐ Yes ☐ No

j2 Will you be undertaking a placement as part of the Turing Scheme or Taith? n ☐ Yes ☐ No

Placement details

k Where will your placement be? n

☐ Abroad ☐ UK/ROI ☐ Don't know

Placement name and address

Postcode

Is the placement:

☐ paid

☐ unpaid

If 'unpaid', please tick which type:

☐ a hospital, Public Health Service Laboratory or 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, or a voluntary organisation providing facilities or carrying out similar activities;

☐ the prison or probation sector or after-care services;

☐ unpaid research in a UK/ROI or overseas institution; or

☐ an unpaid placement that is not listed above. n

Section 4 - your UK bank or building society account details

This account must be in your own name and be able to accept direct credits.

You do not need to provide your bank or building society account details if you are only applying for a Tuition Fee Loan or Student Contribution Loan.

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.

You can update your bank details at any time by logging into your student finance account at **www.studentfinanceni.co.uk**

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 Student Contribution Loan, please complete this section to tell us how much you want to apply for.

National Insurance number

☐☐ - ☐☐☐☐☐☐ - ☐

We will share the National Insurance number you provide with the Department for Work and Pensions to confirm that it's valid, and with HM Revenue and Customs to allow us to collect your repayments.

Maintenance Loan

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

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. This will be paid directly to your university or college.

Amount of Tuition Fee 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 £

Student Contribution Loan

The Student Contribution Loan is for students studying on an undergraduate higher education course at a relevant institution of higher education in the Republic of Ireland.

Amount of Student Contribution 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 £

Contact details

We need you to give the name and address of two additional contacts. We'll only contact them if we can't get in touch with you, for example if you move address and forget to tell us. By entering these details, you're confirming you've told your additional contacts about this and they're happy for the Student Loans Company Ltd (SLC) to contact them if necessary.

Contact 1	**Contact 2** (Contact 2 must live at a different address from Contact 1)
Forename(s)	Forename(s)
Surname	Surname
Relationship to you	Relationship to you
Address	Address
Postcode	Postcode
Country	Country
Phone number	Phone number

Section 5 - 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 6**

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 6**

a3 Will you have care of a person under the age of 18 on the first day of the academic year? n e ☐ Yes ☐ No

if 'Yes', you may be considered an independent student, **go to section 6**

If you have previously been considered independent because you have supported yourself financially for a total of 3 years or more prior to the start of the first academic year of your course, you will continue to be considered independent.

if this applies to you **go to section 6**

b Please tick the relevant box if any of the following apply to you:

- ☐ Your parents cannot be found or it is not reasonably practicable to get in touch with them.
- ☐ You are irreconcilably estranged from (have no contact with) your parents and this will not change. 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 UK, Gibraltar or EU and the assessment of their financial circumstances would place them in jeopardy.
- ☐ Your parents are living outside the UK, Gibraltar or EU and it would not be reasonably practicable or possible for them to send you money.

If you've ticked any of the boxes above, you will be contacted for evidence if your situation has changed since last year and subject to this, you may be considered independent.

If you haven't ticked any of the boxes above you're a dependent student.

Section 6 - student financial questions

If you leave any questions blank we will not be able to process your application. If a question does not apply to you, please enter 'None' or 'N/A' as the answer.

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 this academic year. n £

What is the source of this income?

Payments from an employer

b1 Will your employer be releasing you to attend your course this academic year? ☐ Yes ☐ No if 'No' **go to c**

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

b2 During this academic year, 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

c Give details of any children who will be wholly or mainly financially dependent on you during this academic year.
Your child's income should include their income from all sources for tax year 2022-23 after Income Tax and social security contributions.

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

Section 7 - Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

Only complete this section if you want to apply 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 this academic year for: n

You £ Your partner £

How much of this will be Child Tax Credit or Universal Credit for this academic year?

You £ Your partner £

Only answer this question if you are applying for Childcare Grant.

d During the academic year, do you or your partner expect to receive:
- the childcare element of Working Tax Credit or Universal Credit; or
- Tax-Free Childcare from HM Revenue and Customs (HMRC); or
- a healthcare bursary or Scottish Healthcare Allowance n ☐ Yes ☐ No

! **If 'Yes', you can't get Childcare Grant and receive childcare support from one of these sources at the same time. You can still apply for Childcare Grant, however, you'll only get it if you stop receiving support from these sources.**

e1 Are you applying for Adult Dependants' Grant? ☐ Yes ☐ No if 'No' **go to f**

e2 Who is your adult dependant?

☐ husband, wife, civil partner or partner (if you are over 25) **go to section 8**

☐ other adult dependant **go to e3**

e3 Will your other adult dependant's income be more than £3,873 in this academic year? ☐ Yes ☐ No

! **If 'Yes' you won't be able to receive Adult Dependants' Grant**

Section 7 - Parents' Learning Allowance, Adult Dependants' Grant and Childcare Grant

Continued

e4 Give your other adult dependant's income for tax year 2022-23 n e

Income

All salary/wages and self employed income (including income from property)	£
All income from pensions (including private, occupational and state)	£
All gross taxable income and interest from savings, investments and dividends	£
Taxable state benefits	£
All other taxable income (including redundancy payments and compensation for loss of job)	£

Deductions

Private Pension contributions and Additional Voluntary contributions (AVCs)	£
Allowable expenses on which tax relief is claimed	£

Section 8 - about your family n

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

If you are an **independent student with a partner**, go to the **terms and conditions** on **pages 19 and 20** and then pass this form to your partner to complete **section 9**.

If you are a **single independent student**, go to the **terms and conditions** on **pages 19 and 20.**

a With which parent do you normally live, or have more contact?

☐ Mother ☐ Father **or** ☐ Both ☐ N/A

b What is the relationship status of this parent at the time of applying?

- ☐ Single (never married/civil partnership and not living with a partner) n
- ☐ Living with a partner
- ☐ Married/civil partnership
- ☐ Separated
- ☐ Divorced/dissolved civil partnership
- ☐ Widowed/surviving civil partner

c Have your parents divorced, separated e or been in a civil partnership which has been dissolved, since 1 September 2023?

☐ **Yes** ☐ **No**

Now please read and sign the **terms and conditions** on **pages 19 and 20** and then pass this form to the person(s) who you have indicated in 'question a' to complete **section 9**.

What you need to do next

Read and sign the **terms and conditions** on **pages 19 and 20** and then pass this form to your parent(s).

What your parent(s) need to do

The parent(s) you normally live with should complete **section 9**. If the parent indicated in **'a'** is married, in a civil partnership or living with a partner, their partner must also complete **section 9**.

If the parent indicated in '**a**' is Divorced/dissolved civil partnership, Separated or Widowed/a surviving civil partner but currently living with a partner their partner must also complete **section 9**.

Additional notes

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

Terms and Conditions

These terms and conditions ("terms") and applicable legislation apply to all of the student finance available to students for the academic year 2024/25.

I understand that I must read the specific terms about the student finance products available because they will affect me if I apply for them at any time in this academic year.

I understand that my application for student finance may be delayed unless I sign and date these terms.

Loan Contract

1. I confirm I have read and understood these terms and A Guide to Terms and Conditions available at **www.studentfinanceni.co.uk/terms-and-conditions**
2. 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 that I may not receive student finance, any support I have had may be withdrawn and I could be prosecuted.
3. I understand that student finance is provided to me by the Department for the Economy (the "Lender") which includes any persons acting on its behalf and any replacement(s) under Article 4(3) of the Education (Student Support) (Northern Ireland) Order 1998 as amended or replaced from time to time (the "Order").
4. I understand these terms, the Order and the regulations made under Article 3 of the Order will apply to any student finance provided to me by the Lender.
5. I understand that "student finance" in these terms means financial support by way of grant(s) and/or loan(s) made by the Lender under the regulations.
6. I understand that the Student Loans Company Limited ("SLC") and the Education Authority ("EA") carry out certain functions on behalf of the Lender.

My Obligations

7. I understand that if I have:
   i. reached the age of 18 years; and
   ii. have entered into agreement(s) for a loan under the order before I reached the age of 18 years,

   I am agreeing to "ratify" any and all such student loans by signing these terms. This means that I confirm I entered into agreement(s) with the Lender and agree to the terms of any such previous agreement(s). If I have reached the age of 18 and refuse to "ratify" any previous agreement(s), I understand that I will not be eligible to get any further student finance under the regulations.
8. I agree to give SLC and EA any information they need in support of this application for student finance and to seek repayment.
9. I agree to tell SLC and EA immediately if my circumstances change in any way that might affect my entitlement to student finance. I understand that if I do not do this I may not get any further payments and I may have to repay the student finance I have already received. I agree that from the date I submit my student finance application until my loan(s), together with all and any interest, penalties and charges which apply, is fully repaid I must tell SLC and EA about any changes in my personal details (including my National Insurance number) and contact details I have provided.
10. I agree that if I get an overpayment of student finance, I need to repay this in full and that any overpayment may be taken from any future entitlement to student finance.
11. I agree that I will repay the Lender any loan(s), together with all and any interest, penalties and charges which apply. I understand that this repayment will be due by me to the Lender as a debt. If I breach any of the terms of my loan, I agree to pay any charges and penalties which apply under the Order and the regulations. I understand that I will repay my loan(s) through the United Kingdom ("UK") tax system and/or I may repay SLC directly. If I live abroad, I will repay my loan(s) to SLC directly.

12. I agree that any loan(s) made to me in accordance with the regulations once my application is accepted by the Lender is a/ are contract(s) between me and the Lender. I understand that I am liable for my loan(s) and will be charged interest from the first payment of the loan advance by the Lender.
13. I agree to tell SLC if I leave the UK to live outside the UK or if for any other reason I am outside the UK tax system for more than three months.

Legal Action and Applicable Law

14. In the event of any legal action, I agree that the laws of Northern Ireland will apply and that the courts of that part of the UK will hear any legal action. If my address is outside the UK the laws of the part of the UK where my education provider is situated will apply and the courts of that part of the UK will hear any legal action. I agree that the Lender has the right to take legal action against me in any other court with jurisdiction.

Sharing Information

15. If I am in breach of these terms and/or the regulations I agree that the Lender may share information held about me and my account with third parties, including the government or a government agency of another country, who may help to locate me and/or help take action to recover any payments I owe.
16. I confirm where I have provided any personal information about any other person in my student finance application, I have done so with their consent.
17. I understand that SLC will process my personal data in line with the Privacy Notice available at **www.studentfinanceni.co.uk/privacy-notice** which may be updated from time to time.

Disabled Students' Allowance ("DSA")

This section applies if I apply for DSA this academic year.

18. I understand that any equipment I receive through DSA must be used for my course of study and that I am responsible for paying any repair costs.
19. I understand SLC reserves the right to pay the suppliers of any approved equipment and support directly. I will be notified if SLC will make payments directly to suppliers on my behalf.

Childcare Grant ("CCG")

This section applies if I apply for CCG this academic year.

20. I understand that if I do not provide the evidence of childcare costs within the timescales set, I may lose my entitlement. If my childcare costs are different from the estimates I have provided, further payments of my CCG may increase or decrease accordingly. If no further CCG payments are due to be paid to me, I may be liable to repay any difference.
21. 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.
22. I confirm that neither I nor my husband, wife, civil partner or cohabiting partner have chosen to receive support for childcare from:
    i. the childcare element of Working Tax Credit;
    ii. the childcare element of Universal Credit;
    iii. Tax-free Childcare; or
    iv. a healthcare bursary or Scottish Healthcare Allowance;

    and I agree to tell the EA and SLC immediately if I or my husband, wife, civil partner or cohabiting partner does receive this support. I understand that SLC may share my personal data with HMRC to check whether I get childcare support.

Customer Reference Number ☐☐☐☐☐☐☐☐☐☐☐☐☐

Your full name (in BLOCK CAPITALS)

Your signature **X**

Today's date Day ☐☐ Month ☐☐ Year ☐☐☐☐

! The relevant person(s) you indicated in section 8 must complete section 9, as well as the declaration(s) on page 28.

Please pass this form to them now.

If you are a single independent student please go to page 30 to finalise your application.

Section 9 - financial details for tax year 2022-23 for parents and partners

Who needs to complete this section?

Section 8 of this form tells you who needs to complete this section.

What details do I need to provide in this section?

You need to tell us some personal details and what your financial income was for tax year 2022-23. You **must** tell us your 2022-23 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 is entitled to.

To find out how we'll use the information you provide go to **www.studentfinanceni.co.uk/privacy-notice** to read our Privacy Notice before completing this form.

About this section

Section 9 is split into five parts:

Part A - Tell us your name and address and some other personal information.

Parts B and C - Answer every question.

Part D - Answer every question and tell us about any income deductions for tax year 2022-23 where appropriate.

Part E - Tell us about any children who are financially dependent on you.

How to complete this section

If you are a single parent of the student
Enter your information as Person 1, leave Person 2 blank.

If there are two parents, or a parent and a partner, in the student's household
Complete this section with information for both Person 1 and Person 2.

If you are an independent student with a partner
Your partner needs to enter their information as Person 1, leave Person 2 blank

If you're self assessed – read page 13 of the notes for more information.

If you're not self assessed – you can use your P60 to complete this section.

What happens if my household income has dropped since tax year 2022-23?

If your household income has dropped by 5% or more since tax year 2022-23 you can apply for a 'Current Year Income Assessment'.

This means we would use your expected income for tax year 2024-25 instead of your actual income from tax year 2022-23 when calculating the student's entitlement. However, there must be at least a 5% 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 2024-25 income at the end of that tax year.

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

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)

Contact address

Postcode

Contact 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)

Contact address

Postcode

Contact telephone number

Email address

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

If you would like to provide it separately, download a Continuing Student Assessment of Financial Circumstances form 2024/25 from **www.studentfinanceni.co.uk** and return it to us.

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

Part B - Your financial information

Do not submit any evidence in support of the financial information you provide in this section. However, it is important that you keep all evidence relating to tax year 2022-23, as you may be asked to provide us with this evidence at a later date.

Q1

If you are the student's parent, step-parent or parent's partner, you must answer this question.

Give your total gross taxable income (before deductions) from all sources received from 6 April 2022 to 5 April 2023.

Person 1 £

Person 2 £

Total gross taxable income £

go to Q2a

If you are the student's partner, you must answer this question.

Give your total gross taxable income (before deductions) from all sources received from 6 April 2022 to 5 April 2023.

Total gross taxable income £

go to Q2a

Instructions

- Please give gross financial details for tax year **6 April 2022 to 5 April 2023.**
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.

! Please note that if you leave any questions blank we will not be able to process this application.

		Person 1		Person 2	
Q2a	Did you receive Working Tax Credit, Child Tax Credit or Universal Credit?	☐ Yes	☐ No	☐ Yes	☐ No
Q2b	Did you receive Income Support or ESA?	☐ Yes	☐ No	☐ Yes	☐ No

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

Q3 Did you receive any income from salary, wages, taxable state benefits or from occupational or private pensions? n

	Person 1	Person 2
	☐ Yes ☐ No	☐ Yes ☐ No
a Total income from salary / wages	£	£
b Total income from taxable state benefits	£	£
c Total income from occupational pension(s) If you receive a lump sum pension, only declare the amount you received that you paid tax on.	£	£
d Total income from private pension(s) If you receive a lump sum pension, only declare the amount you received that you paid tax on.	£	£

Q4 Did you receive any income from a state retirement pension?

	Person 1	Person 2
	☐ Yes ☐ No	☐ Yes ☐ No
a Total lump sum amount received	£	£
b Total non-lump sum amount received	£	£

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

	Person 1	Person 2
	☐ 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	£	£

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

	Person 1	Person 2
Q6 Did you receive any taxable benefits in kind? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received from taxable benefits in kind	£	£

Q7 Did you receive any other income during tax year 2022-23 that you **haven't** yet told us about?

Person 1 ☐ Yes → Go to Part C

☐ No → Go to Part D

Person 2 ☐ Yes → Go to Part C

☐ No → Go to Part D

Part C - Other income

Instructions

- Complete Part C in the same way you completed Part B giving gross financial details for tax year **6 April 2022 to 5 April 2023**.

	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	£	£
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	£	£

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

	Person 1	Person 2
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	£	£
Q5 Did you receive any income from UK trusts? n	☐ Yes ☐ No	☐ Yes ☐ No
Total income received	£	£
Q6 Did you receive any foreign income? n	☐ Yes ☐ No	☐ 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	£	£

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

Part D – Income deductions

Instructions

- Complete Part D in the same way you completed Part B giving gross financial details for tax year **6 April 2022 to 5 April 2023**.

	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? n	☐ Yes ☐ No	☐ Yes ☐ No
Total amount on which you claimed tax relief	£	£

Section 9 - financial details for tax year 2022-23 for parents and partners

Continued

Part E – 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 2024/25

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 (DD MM YYYY)	Income for the year

Q2 Child dependants in further or higher education in academic year 2024/25

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

If the student is your partner, please include any children they named in section 6 of this form if the children have applied for student finance.

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

Declaration for parents and partners

Before signing, you should read the Privacy Notice 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 the student I am supporting may have their financial support withdrawn and I may be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that my local Student Finance NI (SFNI) office 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

Day Month Year

Today's date

Person 2

Your full name (in BLOCK CAPITALS)

Your signature

x

Day Month Year

Today's date

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.

Deadline

To make sure the student receives their first payment at the start of term, this form must be returned with all of the evidence we need by **28 June 2024.** We will do our best to process this application as soon as possible, however if the deadline date has passed, the first payment may not be ready for the start of term.

Now pass this form back to the student.

Additional notes

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

Checklist

Before returning this form, please make sure you have done the following:

- ☐ Fully answered all questions that apply to you.
- ☐ Enclosed all the documents we have asked for as evidence where you have seen this icon next to a question.
- ☐ Completed the loan request section if you are applying for a Maintenance Loan, Tuition Fee Loan or Student Contribution Loan.
- ☐ Signed and dated the relevant terms and conditions.
- ☐ Asked your parent(s), parent and partner, or your partner to complete section 9 if applying for student finance based on your household income.

When your completed application form with all the relevant evidence has been processed you will be sent a letter showing the amount of financial support you will receive.

Remember to pay the correct postage or we may not receive your form.

You must return your completed form to your local Student Finance NI (SFNI) office. You can find their address at www.studentfinanceni.co.uk

Additional notes

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