

We welcome applications in Welsh. If you would prefer to apply in Welsh, a Welsh version of this form is available. Applying in Welsh will not delay the student's application.

The student that you are providing information for must also complete and return their main application.

**2023/24**

**PFF2**

Assessment of financial  
circumstances

Aseu amgylchiadau  
ariannol

You can also provide your financial details online at:  
**[www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)**

Mae'r ffurflen hon ar gael hefyd ar ein gwefan sef:  
**[www.cyllidmyfyrwyr.cymru.co.uk](http://www.cyllidmyfyrwyr.cymru.co.uk)**



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## 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; or
- 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.

## Use the supporting notes to prevent any delays to the application



Where you see this icon it means there's additional information in the Supporting Notes which will help you complete your supporting application. The notes start on page 13.

This could be information about how to complete a question or section or an instruction to send specific supporting documents.

Read the notes – if you don't answer a question or section correctly or you don't include the documents we need this will delay the students application.

## What details do I need to provide?

You need to provide:

- your personal details, such as your name and address;
- your National Insurance (NI) number (if you have one);
- details of any income from the UK or overseas for tax year 2021-22 that HM Revenue and Customs (HMRC) doesn't know about;
- details of any pension payments you made for the tax year 2021-22; and
- details of any other dependants.

## Why do I need to tell you my income from the 2021-22 tax year?

We use figures from this tax year because it is the most up-to-date information that HMRC holds for you.

You must tell us your 2021-22 income details as we cannot accept amounts from any other tax year.

This ensures the student(s) you're supporting receives everything they're entitled to.

## What happens if my household income has dropped since tax year 2021-22?

If your household income is expected to or has dropped by at least 15% since tax year 2021-22, you can apply for a current year income assessment. This means we'd assess the student for funding based on your estimated income for tax year 2023-24.

You must still complete this form but can provide a more up to date income figure later to ensure the student gets paid the right amount. Read page 13 of the supporting notes for information on how to apply for a current year income assessment.

## Additional information

To find out how we'll use the information you provide go to [www.studentfinancewales.co.uk/privacynotice](http://www.studentfinancewales.co.uk/privacynotice) to read our Privacy Notice before completing this form.

**If you have further questions you can:**

- check out the supporting notes
- visit [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

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## How to complete this form

Tick the option below that applies to you and follow the instructions given.

### Option 1

I am:

- the student's natural or adoptive parent; or
- the student's step-parent; or
- the husband, wife, civil partner or cohabiting partner of one of the student's parents.

You and your cohabiting partner, if you have one, need to complete the rest of the form as instructed.

By cohabiting partner we mean your husband, wife, civil partner, or long term partner that lives with you.

**You** should provide the student's details in Section 1 and complete the rest of the form as **Person 1**.

**Your cohabiting partner** should complete the rest of the form as **Person 2**. If you don't have a cohabiting partner leave Person 2 blank.

If you, or your cohabiting partner, are asked to answer a question and it is left blank this could delay any payments to the student.

You do not have to disclose your financial information to your partner.

If you would like to provide your information separately go to: [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk) and you can download another copy of this form.

### Option 2

I am:

- the student's husband, wife or civil partner; or
- the student's cohabiting partner and I live with them as though I am married or in a civil partnership. You must complete this form if:
  - the student started their course on or after the 1 August 2018; or
  - the student started their course before the 1 August 2018 and was over 25 on the 1st day of the 1st academic of their course.

You should provide the student's details in Section 1 and complete the rest of the form as Person 1, leave person 2 blank. By cohabiting partner we mean your husband, wife, civil partner, or long term partner that lives with you.



If the two options above don't apply to you, then you can't complete this form. You should give the form back to the student.

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## Section 1 Personal details

### a Student's details

If you are supporting more than one student, include their details in section 6.

Customer Reference Number

Forename(s)

Surname

Date of birth (DDMMYYYY)

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### b Your personal details

#### Person 1

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Any other names you may be known by

Sex

Male Female

What is your current marital status?

Married/civil partnership

Divorced/dissolved civil partnership

Living with a partner

Separated

Widowed/surviving civil partner

Single

Preferred correspondence language

Welsh English

#### Person 2

Your Customer Reference Number  
(If you have one)

Relationship to the student

Title

Forename(s)

Surname

Any other names you may be known by

Sex

Male Female

What is your current marital status?

Married/civil partnership

Divorced/dissolved civil partnership

Living with a partner

Separated

Widowed/surviving civil partner

Single

Preferred correspondence language

Welsh English

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## Section 1 Personal details

### Person 1 - continued

Date of birth          
(DDMMYYYY)

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 - continued

Date of birth          
(DDMMYYYY)

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

## Section 2 Data sharing and you

**If you have a National Insurance (NI) number** you must provide it below. We will use your NI number to check your income for the 2021-22 tax year with HM Revenue & Customs. This allows us to gain the most accurate financial information.

**If you do not have an NI number** then we will need full evidence of your financial details for the 2021-22 tax year.

	Person 1	Person 2
<p><b>2.1</b> Do you have an NI number?</p> <p>Provide your NI number:</p>	<p><b>Yes</b> <input type="checkbox"/> <b>No - go to 2.6</b> <input type="checkbox"/></p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p><b>go to 2.2</b></p>	<p><b>Yes</b> <input type="checkbox"/> <b>No - go to 2.6</b> <input type="checkbox"/></p> <p><input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/></p> <p><b>go to 2.2</b></p>
<p><b>2.2</b> Did you complete a self assessment tax return in the UK for the tax year 2021-22?</p>	<p><b>Yes - go to 2.3</b></p> <p><b>No - go to 2.5</b></p>	<p><b>Yes - go to 2.3</b></p> <p><b>No - go to 2.5</b></p>
<p><b>2.3</b> Did you receive any UK income that was under a tax threshold?</p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to 2.4</b></p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to 2.4</b></p>
<p><b>2.4</b> Did you receive any income in tax year 2021-22 from overseas that <b>wasn't</b> declared to HMRC?</p>	<p><b>Yes - go to section 4</b></p> <p><b>No - go to section 5</b></p>	<p><b>Yes - go to section 4</b></p> <p><b>No - go to section 5</b></p>
<p><b>2.5</b> HMRC will tell us any income you received in the UK from employment, benefits and/or pensions. Did you receive any other income?</p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to section 5</b></p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to section 5</b></p>
<p><b>2.6</b> Did you have any income during the <b>2021-22</b> tax year? <input type="checkbox"/></p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to section 5</b></p>	<p><b>Yes - go to section 3</b></p> <p><b>No - go to section 5</b></p>

## Section 3 Other income in the UK

### Instructions

- Please give your financial details for the tax year from **6 April 2021 to 5 April 2022**.
- Answer 'Yes' or 'No' to question Q1, if you answer 'Yes' please provide the income amount.
- If you answer 'No' to question Q1, this means you are telling us that you **did not** receive any income from that particular income type in tax year 2021-22.



**Although you may not have declared income to HMRC as it was below the taxable threshold, this needs to be declared and will be used when calculating the student's entitlement.**

#### Financial details

**Q1** Did you receive any income in the UK that HMRC doesn't know about?

**a** Total income from savings and investments  
Only tell us about the amount of interest/income you gained from savings and investments during the 2021-22 tax year, not the actual amount of savings or invested sums you had.

**b** Total income from property lettings, land or rent  
This includes the Rent a Room Scheme.

**c** Total income from casual/freelance earning(s)  
This includes any supplementary sources of income.

**Q2** Did you receive any income from overseas that you haven't already told HMRC about?

#### Person 1

**Yes**

**No - go to Q2**

£

£

£

**Yes - go to section 4**

**No - go to section 5**

#### Person 2

**Yes**

**No - go to Q2**

£

£

£

**Yes - go to section 4**

**No - go to section 5**

## Section 4 Overseas income for tax year 2021-22

### Instructions

- Please give your financial details for the tax year from **6 April 2021** to **5 April 2022**.
- Please enter your income in the currency you were paid in, you don't need to convert it.



**You will need to send us evidence of any income declared in this section as HMRC are unaware of it.**

### Financial details

**Q1** Did you receive any income from overseas from the following sources:

### Person 1

**No** - go to section 5

**Yes**

### Person 2

**No** - go to section 5

**Yes**

**a** Income from employment or self-employment

If you have already informed HMRC of this income, you should not state it here.

**b** Income from taxable state benefits

**c** Income from occupational, private pension(s)

If you received a lump sum pension, only declare the amount that you paid tax on.

**d** Any other income

Examples of this includes income from:

- savings and investments;
- property lettings, land or rent; or
- casual freelance earnings.

This is not an exhaustive list, you may have other income.

**e** Total overseas income that HMRC doesn't know about?

Please total the amounts declared in questions a to d to provide an overall amount.

**Q2** If your income in Q1 was not paid in pounds sterling, what currency was this paid in?



## Section 5 Income deductions

### Instructions

- Please give your financial details for the tax year from **6 April 2021** to **5 April 2022**.
- Answer 'Yes' or 'No' to questions Q1 and Q2, if you answer 'Yes' please provide the income amount.

**!** Any deductions declared in section 5 will reduce your household income figure when calculating the student(s) entitlement (as long as evidence is provided).

	Person 1		Person 2	
<b>Q1</b> Did you pay any private pension contributions? <input type="checkbox"/>	<b>Yes</b>	<b>No - go to Q2</b>	<b>Yes</b>	<b>No - go to Q2</b>
Total amount you paid	£		£	
<b>Q2</b> Did you pay any Additional Voluntary Contributions (AVCs)? <input type="checkbox"/>	<b>Yes</b>	<b>No - go to section 6</b>	<b>Yes</b>	<b>No - go to section 6</b>
Total amount you paid	£		£	

## Section 6 Your dependants – not in further or higher education

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 2023/24

Do not include any dependants in further or higher education in Q1. Their details should be put into Q2. Include unearned income for **all** dependants.

If you have more than 2 children and need more space use the additional notes section on page 12.

Full name

Full name

Date of birth (DDMMYYYY)

Income for the year

Date of birth (DDMMYYYY)

Income for the year

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## Section 6 Your dependants – in further or higher education

### Q2 Child dependants in further or higher education in academic year 2023/24

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

If the student is your partner, please include any children they named in their application for student finance if the children have applied for student finance.

If you have more than 2 children and need more space use the additional notes section on page 12.

Full name

Full name

Date of birth (DDMMYYYY)

School, college or university

Date of birth (DDMMYYYY)

School, college or university

Course

Course

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

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

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

Yes No

Student's Customer Reference Number  
(if you know this)

Student's Customer Reference Number  
(if you know this)

# Declaration

 **Tick the declaration box below and choose how to return the form to us.**

By ticking this box, you are agreeing to the following:

- 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 Ltd (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.

## Option 1

### Uploading the form from your device

 **Type your full name and today's date in the boxes provided.**

#### Person 1

Your full name (in BLOCK CAPITALS)

Today's date (DDMMYYYY)

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#### Person 2

Your full name (in BLOCK CAPITALS)

Today's date (DDMMYYYY)

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### Uploading the form

- 1 – Save this form to your device
- 2 – Go to your online account  
[www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)
- 3 – Click on the 'manage your student finance' section, then choose 'upload supporting evidence'

**You can upload the form to one person's account even if two people have completed it. We'll link everything for you.**

## Option 2

### Printing off and posting this form

 **Enter your full name, today's date and provide your signature in ink, in the boxes provided.**

#### Person 1

Your full name (in BLOCK CAPITALS)

Your signature (in Ink)

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Today's date (DDMMYYYY)

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#### Person 2

Your full name (in BLOCK CAPITALS)

Your signature (in Ink)

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Today's date (DDMMYYYY)

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### Posting the form

Once you have completed this form and signed and dated the declaration, please return it to:

**Student Finance Wales**  
**PO Box 211**  
**Llandudno Junction**  
**LL30 9FU**

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

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## **Additional notes**

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

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# Support notes to help you complete this form

## Notes

### What happens if my household income has changed since tax year 2021-22?

If your total household income (before tax) for the tax year 2023-24 will be at least 15% less than it was in tax year 2021-22, still complete this section as well as completing a 'Current Year Income Assessment Form'.

You can download the form at: [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk) and return it with this application.

 Please note that a current year income assessment cannot be carried out unless you provide your financial details for the 2021-22 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
- A final or conditional order

## Section 2 Data sharing and you

We will check your National Insurance (NI) number 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 don't have an NI number you must provide copies of your financial documents.

If you didn't have any income for the tax year 2021-22, you need to provide:

- a letter from you confirming that you had no income for the tax year 2021-22; or
- a letter from any third parties who were supporting you during the tax year (such as a partner)

The letter must be signed and dated in order for it to be accepted.

## Section 3 Other income for tax year 2021-22

Please give financial information for tax year 2021-22. Normally, this is the year ending 5 April 2022, but may differ if your employer or business has a tax year which does not end in April.

### Q1 Income in the UK that HMRC doesn't know about

You may have earned under the threshold to declare this income to HMRC, but this will still be used to calculate the student's entitlement.

## Section 4 Overseas income for tax year 2021-22

### Q1 Income from overseas that you haven't already told HMRC about

You only have to tell us about any income earned overseas that you have not already disclosed to HMRC as part of your self-assessment.

#### a Total income from salary/wages/self-employment

You'll need to provide copies of your tax documents from the relevant country confirming the income amount for the 2021-22 tax year.

#### b Total income from state benefits

You'll need to provide copies of your benefits documents, from the relevant country, confirming the total taxable benefit(s) you received for the 2021-22 tax year.

#### c Total income from occupational, private or state pension(s)

You'll need to provide copies of your pension documents, from the relevant country, confirming the total taxable pension(s) amount you received for the 2021-22 tax year.

## Section 5 Income deductions

### If you did not pay any private pension contributions or additional voluntary contributions

You don't need to provide evidence of this.

### If you paid any private pension contributions or additional voluntary contributions

The evidence you need to provide can be found in the table below.

Deduction type	Evidence required
Private pension contribution	Tax Return (all pages) or Statement from Pension Provider
Additional voluntary contribution (AVC)	Confirmation from DWP of Amount of Pension Paid, Tax Return (all pages) or a P60

## 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 2023 and 31 December 2023 inclusive	1 September 2023 to 31 August 2024
1 January 2024 and 31 March 2024 inclusive	1 January 2024 to 31 December 2024
1 April 2024 and 30 June 2024 inclusive	1 April 2024 to 31 March 2025
1 July 2024 and 31 July 2024 inclusive	1 July 2024 to 30 June 2025

**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.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)

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.

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## Declaration

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

You must notify Student Finance Wales 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.