

**2023/24**

**PR2**

Confirmation of information  
about financial circumstances

Cadarnhau gwybodaeth am  
amgylchiadau ariannol

English Form - **Pages 1-24**  
Ffurflen Saesneg - **Tudalennau 1-24**

Welsh Form - **Pages 24-50**  
Ffurflen Gymraeg - **Tudalennau 24-50**

## 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 cohabiting partner and you live with them as though you are married or in a civil partnership. You must complete this form if:
  - The student started their course on or after the 1st of August 2018; **or**
  - The student started their course before the 1st of August 2018 and was over 25 on the 1st day of the 1st academic year of their course.

## 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 2023-24. You **must** tell us your 2023-24 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.

## 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

**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)
- **If you have any questions or need any further information you can:**
  - visit: [www.studentfinancewales.co.uk](http://www.studentfinancewales.co.uk)
  - Call us on **0300 200 4050**

Once your form is fully complete and the declaration has been signed and dated, you should return it to us at:

**Student Finance Wales**

**PO Box 211**

**Llandudno Junction**

**LL30 9FU**

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.



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

## Section 1 - personal details

### a Student's details

Customer Reference Number

Forename(s)

Surname

Date of birth

Day  Month  Year

### b Your details

(Please complete this question with the details exactly as they appear on your birth certificate or passport.)

Forename(s)

Surname

Sex

Male

Female

Date of birth

Day  Month  Year

Place of birth (name of the town or village)

If you have your own Customer Reference Number, please write it here

Relationship to student

Email address

## 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. [n](#)

I have an NI number

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



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

### Instructions

- Please give financial information for the tax year from **6 April 2023 to 5 April 2024**.
- Answer 'Yes' or 'No' to every question, if you answer 'Yes' please provide the income amount.
- Where you tell us an amount, you must provide photocopied evidence to support it. 
- 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.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. 



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

### Financial details

**Q1** Did you receive Working Tax Credits or Child Tax Credits?  Yes  No

**Q2** Did you receive Income Support or Universal Credit?  Yes  No


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

 **Financial evidence required** – Please provide photocopied financial evidence for each individual amount entered above. The following table summarises the photocopied evidence you need to send to support the amounts you have given.

Income type	Tax year 2023-24 photocopied evidence items you can send
Salary, taxable state benefits, occupational / private pension(s)	P60
Wages and occupational pension(s)	Month 12 wageslip or Week 53 wageslip
Taxable state benefits – if you were unemployed for the full tax year	P60U

## Section 3 - your financial information

Continued

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

Yes  No

**a** Total non-lump sum amount received

£

**b** Total lump sum amount received

£

**e** **Financial evidence required** – Please provide photocopied financial evidence for the amount(s) entered above. The following table summarises the photocopied evidence you need to send.

Income type	Tax year 2023-24 photocopied evidence items you can send
Your pension payments	Confirmation from the Department for Work and Pensions P60 BR735 Confirmation from the Benefits Agency
Your pension payments if you were Self Assessed and completed an online tax return <input type="checkbox"/>	A photocopy of your full finalised online tax return
Your pension payments if you were Self Assessed and completed a short paper tax return <input type="checkbox"/>	A photocopy of your full finalised SA200 form
Your pension payments if you were Self Assessed and completed a full paper tax return <input type="checkbox"/>	A photocopy of your full finalised SA100 form

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

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

£

**e** **Financial evidence required** – Please provide photocopied financial evidence for each individual amount entered above.

## Section 3 - your financial information

Continued

Income type	Tax year 2023-24 photocopied evidence items you can send
Interest from UK banks, building societies and unit trusts	Bank / building society statements Photocopies of dividends Half yearly statements
Income from savings and investments if you were Self Assessed and completed an online tax return	A photocopy of your full finalised online tax return
Income from savings and investments if you were Self Assessed and completed a short paper tax return	A photocopy of your full finalised SA200 form
Income from savings and investments if you were Self Assessed and completed a full paper tax return	A photocopy of your full finalised: SA100 and SA101 forms; plus your SA104F or SA104S form (where applicable); or SA106 form

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

Yes  No

Total income received

£

**e** **Financial evidence required** – Please provide photocopied financial evidence for the amount entered above. The following table summarises the photocopied financial evidence you need to send.

Income type	Tax year 2023-24 photocopied evidence items you can send
Taxable benefits in kind if your salary was £8500 or more <input checked="" type="checkbox"/> n	P11D
Taxable benefits in kind if your salary was less than £8500	P9D

### Any other income



**Q7** Did you receive any other income during the 2023-24 tax year that you **haven't** yet told us about?

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 financial details for the tax year from **6 April 2023 to 5 April 2024**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon.   
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.
- Where any amount is entered you must provide photocopied evidence to support it. A table has been provided at the end of section 4 to summarise what photocopied financial document(s) you need to send. 

**Q1** Did you receive any income from self-employment? 

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? 

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? 

Yes  No

Total income received


£

**Q4** Did you receive any income from property lettings? 

Yes  No

Total income received

£

**Q5** Did you receive any income from UK trusts? 

Yes  No

Total income received

£

## Section 4 - other income

Continued

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

Yes  No

Total income received

£

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

Yes  No

Total income received

£

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

Yes  No

Total income received

£

### Photocopied financial evidence you need to send for the tax year 2023-24



e Please provide photocopied financial evidence for each individual amount you entered in section 4. The following table summarises the photocopied evidence you need to send.

How you submitted your 2023-24 details to HM Revenue and Customs (HMRC)	Photocopied document(s) you need to send - tax year 2023-24
Online tax return	A photocopy of your full finalised online tax return
Short paper tax return	A photocopy of your full finalised SA200 form
Full paper tax return	<p>A photocopy of each individual form that any amount you told us about is recorded on. Depending on your tax circumstances you may need to send us a copy of your full finalised:</p> <ul style="list-style-type: none"> <li>SA100 – Main tax return form</li> <li>SA101 – Additional information</li> <li>SA102M – Ministers of religion</li> <li>SA103S – Self-employment short version</li> <li>SA103F – Self-employed full version</li> <li>SA103L – Lloyds underwriters</li> <li>SA104F – Partnership full version</li> <li>SA104S – Partnership short version</li> <li>SA105 – UK Property</li> <li>SA106 – Foreign</li> <li>SA107 – Trusts</li> </ul>



## Section 5 - income deductions

### Instructions


- Complete section 5 in the same way you completed section 4 giving financial details for the tax year from **6 April 2023 to 5 April 2024**.
- If you need help with any questions you should refer to the guidance notes each time you see this icon. 
- Where you tell us an amount you must provide photocopied evidence to support it. 

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

Yes  No

Total amount you paid

£

 **Photocopied financial evidence required** - Please provide photocopied financial evidence for the amount entered above. The following table summarises the photocopied evidence you need to send.


Contribution type	Tax year 2023-24 photocopied evidence items you can send
Your private pension contributions	Annual statement from your pension or insurance company P60 Tax Calculations Confirmation from the Department for Work and Pensions of the amount of pension paid
Your private pension contributions if you were Self Assessed	A photocopy of your full finalised tax return

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

Yes  No

Total amount you paid

£

 **Photocopied financial evidence required** - Please provide photocopied financial evidence for the amount entered above. The following table summarises the photocopied evidence you need to send.

Contribution type	Tax year 2023-24 photocopied evidence items you can send
Your Additional Voluntary Contributions (AVCs)	Annual statement from your pension or insurance company P60 Tax Calculations Confirmation from the Department for Work and Pensions
Your Additional Voluntary Contributions (AVCs) if you were Self Assessed	A photocopy of your full finalised tax return

## Section 5 - income deductions

Continued

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

Yes  No

Total amount on which you claimed tax relief

£

**e** **Photocopied financial evidence required** - Please provide photocopied financial evidence for the amount entered above. The following table summarises the photocopied evidence you need to send.

Expense type	Tax year 2023-24 photocopied evidence items you can send
Your allowable expenses on which you claimed tax relief	Coding Notice (P2)
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed an online tax return	A photocopy of your full finalised online tax return
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed a short paper tax return	A photocopy of your full finalised SA200 form
Your allowable expenses on which you claimed tax relief if you were Self Assessed and completed full paper tax return	A photocopy of your full finalised: SA100 SA101 and / or SA102 form

## Section 6 - 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 2023/24

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 2023/24

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

If the student is your partner, please include any children they named on their Application for Student Finance 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

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

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 signing this form.

- 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 provide any further information in relation to the applicant's application for financial support as may reasonably be required, and I agree to provide immediate notice of, and details in relation to, any change in my circumstances that might in any way affect this application for financial support.

Your full name (in BLOCK CAPITALS)	<input type="text"/>				
Your signature	<input type="text" value="X"/>	Date	<input type="text" value="Day"/> <input type="text" value=""/>	<input type="text" value="Month"/> <input type="text" value=""/>	<input type="text" value="Year"/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>

## 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 Data Protection Act.

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

Please give evidence for the tax year 2023-24. Normally, this is the year ending 5 April 2024 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.

If you are self assessed, you should refer to your completed tax return for your financial information.

### **Q3 Income from salary, wages, taxable state benefits or from occupational or private pensions**

#### **a Total income from salary / wages**

If as part of your salary or wages for the tax year 2023-24 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.

#### **b Taxable state benefits**

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.

## section 3 – your financial information

### Q5 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 2023-24 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.

## section 3 – your financial information

### **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 ISA's
- Your share of taxed interest etc.
- Total untaxed savings income taxable at 20%
- Taxed income taxable at 10%
- Taxed income taxable at 20%

### **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

## section 3 – your financial information

### **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
- Interest and other income from overseas savings
- Dividends from foreign companies
- Dividend income received by a person overseas



## section 3 – your financial information

### Q6 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 2023-24 tax year. Add together all the benefits in kind you received and write your total figure on the form.

- Assets placed at employees disposal (cars, property, goods or other assets)
- Payments made on behalf of employee
- Vouchers and credit cards
- Living accommodation
- Mileage allowance and passenger payments
- Total cash equivalent of all cars/vans made available
- Total cash equivalent of fuel for all cars/vans made available
- Cash equivalent of loans after deducting any interest paid by the borrower
- Private medical treatment or insurance
- Qualifying relocation expenses payments and benefits
- Services supplied
- Assets placed at employees disposal
- Other items (including subscriptions and professional fees)
- Expenses payments made to, or on behalf of, the employee

## 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 from 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 2023-24 tax year.

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

#### 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 2023-24 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

## section 4 – other income

### Q2 Minister of religion

Tell us about the amount of income you received from the following income type during the 2023-24 tax year:

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

### 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 2023-24 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
- Redundancy and compensation for loss of job
- Lump sums or benefits received from an Employer Financed Retirements Benefit Scheme excluding pensions

## 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 2023-24 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

### 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 2023-24 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

## 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 2023-24 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)

### 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 2023-24 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)

## 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 2023-24 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)

## 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 you had during the 2023-24 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

## section 6 – your dependants

### Academic year

You should provide the child dependants' 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 eligibility for 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.

## 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.

### Change of circumstances

You must provide immediate notification of, and details about, any change in your circumstances, which may affect the applicant's entitlement to financial support. The most common change of circumstances would be if:

- your household income changes; or
- your marital status changes.