


Current Year Income Assessment Form - Academic Year 2012/13

Personal details

How do I complete this form?

Start by completing Section A and then work your way through the form. (Depending on your circumstances you may not need to complete every section.) Don't forget to sign the Declaration at the end.

- Section A – tax credits and income support
- Section B – your financial information
- Section C – other income
- Section D – income deductions

Notes to help you complete some of the questions within the form can be found every time you see this icon. 

After I have sent you my completed form, do I need to do anything else?

Yes, but not just now. After tax year 2012-13 has ended, we will contact you and ask you to confirm, with evidence, your actual earnings for that tax year.

These evidence items will be the same documents that you send to, or receive from, HM Revenue & Customs. For example, a P60, SA200 or Self Assessed Tax Return.

If your actual income is different from your estimates we may adjust the amount of student finance awarded. If we have paid the student(s) too much we may have to recover student finance from them.



Section A - tax credits and income support

Q1 Does your tax year end on 5 April 2013?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No						
<input type="text"/>		/	<input type="text"/>		/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If no, when does it end?



If your tax year ends on a date other than 5 April 2013, please provide us with information for your tax year that will end during the academic year 2012/13.

Q2 Will or do you expect to receive Working Tax Credits or Child Tax Credits?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
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Q3 Will you receive Income Support?

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
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Section B - your financial information

How to answer the questions in this section:

- If you answer 'Yes' to any of these questions you will need to provide the **total** amount of income you expect to receive for that income type.
- The total amount should include all earnings covering the full tax year. For example, if you were made redundant part-way through the year, you need to include earnings from 6 April 2012 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2013.
- For pension payment questions, please only tell us the amount of the pension you expect to receive from the first month you receive it until the end of the tax year. You don't need to tell us the full annual amount.
- If you answer 'No' to any question, this means you are telling us that you do not expect to receive any income from that particular income type.

Q1 Do you expect to receive any income from salary, wages, taxable state benefits or from occupational or private pensions?

- a** Total expected income from salary / wages
- b** Total expected income from taxable state benefits
- c** Total expected income from occupational pension(s)
- d** Total expected income from private pension(s)

<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
£	<input type="text"/>		
£	<input type="text"/>		
£	<input type="text"/>		
£	<input type="text"/>		

n If you are in receipt of taxable state benefits, only include the following benefits in your total above:

- 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

Section B - your financial information - continued

Q2 Do you expect to receive any income from a State Retirement Pension?

a Total expected non-lump sum amount

b Total expected lump sum amount

Yes No

£

£

Q3 Do you expect to receive any income from savings and investments?

a Total expected UK interest from UK banks, building societies and unit trusts **n**

b Total expected income from other savings and investments

c Total income from UK investments and dividends

d Total income from foreign investment and dividends

n Untaxed UK interest (amounts that have not yet been taxed)

Yes No

£

£

£

£

Q4 Do you expect to receive any income from taxable benefits in kind?

Total expected income from taxable benefits in kind

n Taxable benefits in kind are other benefits that you are entitled to, but do not form part of your salary. For example, a fuel allowance or company car.

Yes No

£

Any other income

Q5 Do you expect to receive any other income during the 2012-13 tax year that you **haven't** yet told us about?

Yes - Go to Section C

No - Go to Section D

Section C - other income

Q1 Do you expect to receive any income from self-employment? Yes No

a Total taxable profit from businesses

b Total taxable profit from partnerships

Yes No

£

£

Q2 Do you expect to receive any income as a Minister of religion? Yes No

Total expected income amount (minus expenses that would not normally show on a P60 or P11D)

Yes No

£

Q3 Do you expect to receive any income from lump sums or from other taxable income sources?

Total expected income from lump sums or other taxable income sources. For example, money received as compensation or from redundancy.

Yes No

£

Q4 Do you expect to receive any income from property lettings?

Total expected income from property lettings

Yes No

£

Q5 Do you expect to receive any income from UK trusts?

Total expected income from UK trusts. For example, payments from settlor-interested trusts and income from UK estates.

Yes No

£

Q6 Do you expect to receive any foreign income?

Total expected foreign income

Yes No

£

Q7 Do you expect to receive any income from an overseas pension?

Total expected income from an overseas pension

Yes No

£

Q8 Do you expect to receive any other overseas income and gains?

Total expected other overseas income and gains

Yes No

£

Section D - income deductions

Q1 Do you expect to pay any private pension contributions?

Total expected private pension contributions

Yes No

£

Q2 Do you expect to pay any Additional Voluntary Contributions (AVCs)?

Total expected AVCs

Yes No

£

Q3 Do you expect to have any allowable expenses on which you will claim tax relief?

Total expected allowable expenses on which you will claim tax relief

Yes No

£

Declaration

Our Data Protection Statement sets out who will use the information provided on this form and what they will use it for. Before signing this form please read our statement online at www.direct.gov.uk/studentfinance-dataprotection.

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

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

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

Your name (in BLOCK CAPITALS)

Signature

Relationship to student

Date

DAY MONTH YEAR