

Current Year Income Assessment Form 2018/19

Personal details

Person 1

Your Customer Reference Number

Name

Date of birth / /

Address

Postcode

Person 2

Your Customer Reference Number

Name

Date of birth / /

Address

Postcode

If you want to provide your financial details separately, you can download another copy of this form at www.gov.uk/studentfinance

Before you complete this form

For the student to be assessed based on your estimated income for the tax year 2018-19, we need to be able to compare your estimated income with your actual income for the tax year 2016-17.

Have you given us your financial details for the 2016-17 tax year?

If 'No' you must give us financial details. You can download a form to give your details at www.gov.uk/studentfinance

Person 1

 Yes No

Person 2


 Yes No

If you're awarded a current year income assessment, we'll use your finalised 2018-19 household income to work out how much the student can get if they apply for funding based on household income in the 2019/20 academic year. If your income will fall by a further 15% in 2019/20, you can apply for a further current year income assessment.

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. 



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

Yes, but not just now. After tax year 2018-19 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 2019?	Person 1	Person 2
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, when does it end?	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

! If your tax year ends on a date other than 5 April 2019, please provide us with information for your tax year that will end during the academic year 2018/19.

Q2 Did you receive Working Tax Credits or Child Tax Credits?	Person 1	Person 2
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Q3 Will you receive Income Support?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

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 taxable 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 2018 up to the date of your redundancy and any income you expect to receive from then up to 5 April 2019.
- 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?	Person 1	Person 2
	<input type="checkbox"/> Yes <input type="checkbox"/> No	<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"/> £

a Total expected income from salary / wages

b Total expected income from taxable state benefits **n**

c Total expected income from occupational pension(s)

d Total expected income from private pension(s)

Section B Your financial information - continued

n If you are in receipt of taxable state benefits, only include the following benefits in your total in Q1:

- 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

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

Person 1

Yes No

£

£

Person 2

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

Yes No

£

£

£

£

Yes No

£

£

£

£

n Gross UK interest (before tax has been deducted)
You must include interest you receive on bank, building society and other savings accounts unless it is specifically non-taxable, for example, a non-taxable Individual Savings Account (ISA) etc.

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

Total expected income from taxable benefits in kind

Yes No

£

Yes No

£

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.

Any other income

Q5 Do you expect to receive any other income during the 2018-19 tax year that you **haven't** yet told us about?

Yes - Go to Section C

No - Go to Section D

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?

Person 1

Yes No

£

£

Person 2

Yes No

£

£

a Total adjusted profit from businesses

b Total adjusted profit from partnerships

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? **n**

Yes No

£

n Total expected income from lump sums or other taxable income sources. For example, money received as compensation or from redundancy. You must include the full amount of your redundancy payment, even if you don't expect to pay tax on it.

Yes No

£

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

Yes No

£

Total expected income from property lettings

Yes No

£

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

Yes No

£

n 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?

Yes No

£

Total expected foreign income

Yes No

£

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

Yes No

£

Total expected income from an overseas pension

Yes No

£

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

Yes No

£

Total expected other overseas income and gains

Yes No

£

Section D Income deduction

Q1 Do you expect to pay any private pension contributions?

Total expected private pension contributions

Person 1

Yes No

£

Person 2

Yes No

£

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

Total expected AVCs

Yes No

£

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

£

Yes No

£

Declaration

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

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.gov.uk/studentfinance

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 the student(s) I am supporting may have their financial support withdrawn and I could be prosecuted.
- I agree to supply any further information in relation to the applicant's application for financial support that the Student Loans Company (SLC) may ask for and agree to tell them immediately if my circumstances change in any way that might affect this application for financial support.

Person 1

Your full name (in BLOCK CAPITALS)

Your signature

DAY MONTH YEAR

Today's date

Person 2

Your full name (in BLOCK CAPITALS)

Your signature

DAY MONTH YEAR

Today's date