



**PR2**

Financial Information  
Confirmation Form

**sfe**

**2022/23**

## 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, if the student is aged 25 and over
- The person who previously completed a Current Year Income (CYI) assessment form

## 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 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 are entitled to.

You must send copied financial evidence for every income type you enter. There is a table in each section to let you know what copied evidence to send.

## What if I have further questions?

If you have further questions you can:

- visit [www.sfengland.slc.co.uk/currentyearincome](http://www.sfengland.slc.co.uk/currentyearincome)
- call us on **0300 100 0607**

## Where do I send my form?

The quickest and easiest way to return your form and supporting evidence is by uploading a digital copy of these through your online account.

If you upload your form through the student's account, the declaration must be signed and dated or we will not be able to use the information.

If you are unable to upload your form or evidence, you should complete this form, sign and date the declaration and return it to:

**Student Finance England**  
**PO Box 210**  
**Darlington**  
**DL1 9HJ**

## Additional information

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

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.

# Section 1

# Personal details

### a Student's details

Customer Reference Number

Forename(s)

Surname

Date of birth

Form for Student's details with input boxes for Customer Reference Number, Forename(s), Surname, and Date of birth (DD/MM/YYYY).

### b Your details

Customer Reference Number

Forename(s)

Surname

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

Sex

Date of birth

Place of birth (name of the town or village)

Relationship to student

Email address

Form for Your details with input boxes for Customer Reference Number, Forename(s), Surname, Sex (Male/Female), Date of birth (DD/MM/YYYY), Place of birth, Relationship to student, and Email address.



**Send photocopies of your financial evidence. We will securely destroy all of the financial evidence you send after we have checked it.**

## Section 2

# Income from salary/wages

**2.1** Did you receive any income from salary or wages from 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 3**

### Instructions

- The financial information you provide must be for tax year 6 April 2022 to 5 April 2023
- Where you have told us an amount, you must provide copied financial evidence to support it
- For any income type you don't have, leave the box blank

**2.2** Salary/wages

£

**2.3** Taxable benefits in kind

£

Only include income received for the following benefits:

- Total cash equivalent of all company cars/vans made available
- Mileage allowance and passenger payments
- Professional subscriptions and fees
- Assets transferred or placed at employee's disposal (cars, property, goods or other assets)
- Payments made on behalf of employee
- Vouchers and credit cards
- Cash equivalent of loans after deducting any interest paid to the borrower
- Private medical treatment or insurance
- Qualifying relocation expenses payments and benefits
- Expenses payments made to, or on behalf of, the employee
- Other items

**2.4** Redundancy

£

You must include the full amount of your redundancy payment, even if you don't pay tax on it



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

## Section 2

## Income from salary/wages - continued

Employment	Tax year 2022-23 copied evidence items you can send
If you had one employer	<ul style="list-style-type: none"> <li>Your P60 or your final month payslip</li> </ul> <p>If your P60 shows a 'BR', 'M1', 'W1' or 'T' tax code this could suggest you have another source of income.</p> <p>If you <b>don't</b> have another source of income, you also need to send us:</p> <ul style="list-style-type: none"> <li>A letter to confirm this along with a copy of your P60</li> </ul> <p>If you <b>do</b> have another source of income, you also need to send us:</p> <ul style="list-style-type: none"> <li>Any additional P60s</li> <li>Evidence of any taxable benefits received, for example a P60U</li> <li>Evidence of any pensions received, for example a P60P</li> <li>Any P45s received from previous employers</li> </ul>
If you had more than one employer	<ul style="list-style-type: none"> <li>Your P60 or your final month payslip and any P45s you have received from previous employers.</li> </ul> <p>If you don't have any P45s, you can send a letter from previous employers confirming your income from them.</p>
Taxable benefits in kind	<ul style="list-style-type: none"> <li>Your P11D</li> </ul>
Redundancy	<ul style="list-style-type: none"> <li>A letter on headed paper from your previous employer detailing the total amount of redundancy received; <b>or</b></li> <li>a payslip within the tax year showing your total redundancy.</li> </ul>

## Section 3

# Income from pensions

**3.1** Did you receive any income from pensions from 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 4**

### Instruction

- The financial information you provide must be for payments you received in tax year 6 April 2022 to 5 April 2023
- Where you have told us an amount, you must provide copied financial evidence to support it
- For any income type you don't have, leave the box blank
- Only include payments you received, don't include any payments you paid into a pension

**3.2** Private pensions

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

£

**3.3** Workplace pensions/occupational pensions

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

£

**3.4** State retirement pension

£

**3.5** Overseas pensions

£



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

Income type	Tax year 2022-23 copied evidence items you can send
If you're self-assessed	<ul style="list-style-type: none"> <li>• Your full finalised tax return; <b>or</b></li> <li>• your full finalised SA200; <b>or</b></li> <li>• your full finalised SA100 form.</li> </ul>
If you're not self-assessed	<p>For state retirement pension send:</p> <ul style="list-style-type: none"> <li>• BR735; <b>or</b></li> <li>• awards notice from the Department for Work and Pensions confirming pension payments received.</li> </ul> <p>For private or workplace pension send:</p> <ul style="list-style-type: none"> <li>• your P60; <b>or</b></li> <li>• your P60P; <b>or</b></li> <li>• your final payslip; <b>or</b></li> <li>• your annual statement of payments received from your pension provider.</li> </ul>

## Section 4

# Income from taxable state benefits

**4.1** Did you receive any income from taxable state benefits from 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 5**

### Instructions

- The financial information you provide must be for tax year 6 April 2022 to 5 April 2023
- Where you have told us an amount, you must provide copied financial evidence to support it
- For any income type you don't have, leave the box blank

**4.2** 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
- Jobseeker's Allowance
- Statutory Adoption Pay
- Statutory Maternity Pay
- Statutory Paternity Pay
- Statutory Sick Pay
- Widowed Parent's Allowance

Do not include income from other benefits, including Universal Credit



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

To confirm	Tax year 2022-23 copied evidence items you can send
Taxable state benefits	<ul style="list-style-type: none"><li>• Your P60U; <b>or</b></li><li>• a letter from Jobcentre Plus to confirm the amount of any benefits received covering the full tax year; <b>or</b></li><li>• your finalised tax return; <b>or</b></li><li>• the first 3 pages of your benefit book.</li></ul>

## Section 5

# Self-assessed income/self-employed

**5.1** Did you receive any self-assessed/self-employed income from 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 6**

### Instructions

- The financial information you provide must be for tax year 6 April 2022 to 5 April 2023
- Where you have told us an amount, you must provide copied financial evidence to support it
- For any income type you don't have, leave the box blank

**5.2** Have you submitted your tax return for the 2022-23 tax year?

Yes - complete this section and provide evidence listed on the table on the next page.

No - complete this section with up to date estimates. We'll contact you in February 2024 to send evidence.

**5.3** Self-employment

Adjusted taxable profit from businesses

£

Adjusted taxable profit from partnerships

£

**5.4** Foreign income

Include the foreign currency and amount you declared to HM Revenue and Customs

Name of foreign currency, for example euro, dollar, etc.

Total amount

**5.5** Property lettings

For example, income from UK or foreign property or land

£

**5.6** UK trusts

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

£

**5.7** Lump sums or other taxable income

For example, lump sums or benefits received from an employer financed retirements benefit scheme

£

**5.8** Overseas income and gains

For example, amount of omissions (exemptions under transfer of foreign assets)

£

**5.9** Minister of religion

Don't include expenses already included on your P60 or P11

£



## Section 5

# Self-assessed income/self-employed



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

To confirm	Tax year 2022-23 copied evidence items you can send
Online tax return	<ul style="list-style-type: none"><li>• Your full online tax return</li></ul>
Short paper tax return	<ul style="list-style-type: none"><li>• Your full finalised SA200 form</li></ul>
Full paper tax return	<p>Each individual form that any amount you told us about is recorded on. Depending on your tax circumstances you may need to send us 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 6

# Income from savings and investments

**6.1** Did you receive any income from savings and investments from 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 7**

### Instructions

- The financial information you provide must be for tax year 6 April 2022 to 5 April 2023
- Do not include the actual amount of savings or invested sums you have
- Where you have told us an amount, you must provide copied financial evidence to support it
- For any income type you don't have, leave the box blank

**6.2** UK banks, building societies and unit trusts

£

Include any interest you received on bank, building society and other savings accounts. Don't include ISAs.

**6.3** UK life insurance gains, securities and partnerships

£

**6.4** UK investments and dividends

£

For example, UK dividends or stocks

**6.5** Foreign investments and dividends

£

For example, overseas dividends



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

Income type	Tax year 2022-23 copied evidence items you can send
Interest from UK and overseas banks, building societies and unit trusts	<ul style="list-style-type: none"> <li>• Bank/building society statements; <b>or</b></li> <li>• half yearly statements - don't include income from ISAs.</li> </ul>
Income from savings and investments if you're self employed	<ul style="list-style-type: none"> <li>• Your full finalised tax return; <b>or</b></li> <li>• your full finalised SA200; <b>or</b></li> <li>• your full finalised SA100 and SA101 forms; <b>plus</b></li> <li>• your SA104F or S104S form (where applicable); <b>or</b></li> <li>• your S106 form.</li> </ul>
Income from dividends in the UK or overseas if not self-assessed	<ul style="list-style-type: none"> <li>• Copies of your dividend statement(s) <b>including tax credits</b></li> </ul>

## Section 7

# Income deductions

7.1 Did you have any income deductions in tax year 6 April 2022 to 5 April 2023?

Yes - complete this section

No - go to **section 8**

### Instructions

- The financial information you provide must be for tax year 6 April 2022 to 5 April 2023
- Where you have told us an amount, you must provide copied financial evidence to support it
- We can't accept a payment schedule as evidence
- For any income type you don't have, leave the box blank

7.2 Private pension contributions

Don't include pension contributions from your payslip

£

7.3 Additional Voluntary Contributions (AVCs)

£

7.4 Total expected allowable expenses on which you will claim tax relief

For example, professional fees and subscriptions, business travel and subsistence

£



**Photocopied financial evidence required to confirm the income amount you've given. The following table explains what you need to send.**

To confirm	Tax year 2022-23 copied evidence items you can send
Private pension contributions	<ul style="list-style-type: none"><li>• Annual statement of payments made to your pension provider</li><li>• If self-assessed - your full finalised tax return</li></ul>
Additional Voluntary Contributions (AVCs)	<ul style="list-style-type: none"><li>• Annual statement of payments made to your pension provider</li><li>• If self-assessed - your full finalised tax return</li></ul>
Allowable expenses if self-assessed	<ul style="list-style-type: none"><li>• Your full finalised online tax return</li><li>• Your full finalised SA200 form</li><li>• Your full finalised:<ul style="list-style-type: none"><li>• SA100</li><li>• SA101 <b>and/or</b></li><li>• SA102 form</li></ul></li></ul>
Allowable expenses if not self-assessed	<ul style="list-style-type: none"><li>• Your P11D</li></ul>

## Section 8

## Future applications

Once you've confirmed your actual household income we can use this for the student's future applications.

If your household income drops by 15% or more, you will be able to apply for a further current year income assessment.

Do you consent to us using your actual income for 2022-23 for the students future applications?

Yes

No



**If you don't give consent you still need to complete this form and send evidence to confirm your actual income. The students future application won't be based on your household income and they may not receive their full student finance.**

### Change of circumstances in future years

You must notify Student Finance England about any change in your circumstances that may affect the student's entitlement to financial support.

The most common changes would be if:

- your household income drops again; **or**
- your marital status changes; **or**
- your dependents change.

Changes to dependents would be if:

- a dependent leaves the household; **or**
- a dependent, other than the student, starts university; **or**
- a new dependent joins the household (new child etc).

# Declaration

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.

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

Your full name (in BLOCK CAPITALS)

Your signature

X

Today's date

<input type="text"/>	/	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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**If the student has more than one person supporting their application, both people must complete and return a PR2 form with financial evidence.**

**If we don't receive a PR2 form and evidence from both people supporting the student's application, we'll reassess their finance and they may have to pay some back.**

**If the form is being uploaded through your online account you do not need to sign the declaration. If you upload the form using any other account, you must sign and date the declaration or it can't be accepted.**

# Checklist

## **Before you return this form please make sure that:**

You have answered all the questions that apply to you

You have signed and dated the declaration

You have included all the evidence we need with this form

# What happens next

Please allow four to six weeks for your form and evidence to be processed. We'll send the student a new notification of entitlement letter once we've reviewed your form and evidence or we'll contact you if we need anything else.

If the student has been overpaid, we'll deduct the overpayment from their future funding. If they're not receiving any funding in the future, we'll contact them to discuss affordable repayments.

Go to [www.sfengland.slc.co.uk/currentyearincome](http://www.sfengland.slc.co.uk/currentyearincome) for more information on current year income assessment.

## **You must return your completed form to the address shown below.**

**Student Finance England  
PO Box 210  
Darlington  
DL1 9HJ**