

The symbol ⓘ means to read the 2014/2015 INSTRUCTIONS booklet included in the application package and available online at www.StudentAidBC.ca.

PURPOSE

If you are in receipt of StudentAid BC funding, the Appendix 5 "Transfer of Schools" allows you to transfer to a different school during the study period without the necessity of having to re-apply for student financial assistance.

Section 1, 4 and 5 to be completed by you.

Section 2 to be completed by your original school.

Section 3 to be completed by your new school.

HOW TO COMPLETE THE APPENDIX 5

- 1) Complete Sections 1, 4 and 5, then submit this completed Appendix 5 – Transfer of School form to the original school.
- 2) Your original school completes Section 2. The appendix is either mailed to your new school or returned to you with instructions to take it to your new school.
- 3) Your new school completes Section 3 and forwards the appendix to StudentAid BC.

StudentAid BC will process the transfer and notify you accordingly of any changes to the assessment.

WHEN SHOULD I COMPLETE AN APPENDIX 5 "TRANSFER OF SCHOOL"?

If you have already received / cashed funding from StudentAid BC for your 2014/2015 application; and
If your school has already confirmed your enrolment; and
The break between studies at your original school and your new school is **two weeks or less**; and
You have non-refundable tuition and book costs.

WHEN SHOULD I COMPLETE AN APPENDIX 7 "REQUEST FOR REASSESSMENT TO CHANGE SCHOOLS"?

If you have not received / cashed loans or grant funding from StudentAid BC for your 2014/15 application.
You do not have any non-refundable tuition/book costs.

IMPORTANT!

Contact your financial aid office if you are transferring to a different campus of the same school to determine if an Appendix 5 is required.

If the break in studies between your original school and your new school is more than two weeks, you are considered to have withdrawn from your original school. In order to continue to receive funding, you must submit a new full-time application. Do NOT complete this form.

Faxes, scans or copies are accepted.

The deadline for submitting a completed and correct Appendix 5 is six weeks before your new study period ends.

Section 1 – Personal Information – please complete all sections with accurate and up-to-date personal information.

Section 4 – Your Study Period: Extra costs, income and assets – In this section, you provide information about your income, extra costs and assets during your entire study period.

Note: if your study period dates have changed from your original application, have your spouse complete an Appendix 2 and attach to this Appendix.

Question 43

Answer YES if you will be on an approved co-op/paid work term during the study period indicated on **Questions 31 and 32** in **Section 3**. Include any co-op earnings on line 53.

Question 48

Change in living situation.

Changes to your living situation after the first day of classes cannot be considered. If you move from your parent's home before the first day of classes, you must have your landlord/lady complete a Confirmation of Rent form available at www.StudentAidBC.ca confirming your tenancy. You must also provide either one of the following options:

- A. If you are living in residence at your school, make sure your school places their official school stamp or seal on the form,
- OR**
- B. If you are not in living residence at your school, you must provide copies of your cancelled cheques or, if unavailable, copies of your monthly bank statements confirming your rent payment. This can be done by circling each cash withdrawal on each statement confirming your payment for rent. Internet bank statements may be accepted in PDF format. All other web statements provided must bear the financial institution's bank/branch stamp. All banking documentation must have your name as the account holder.

Questions 50 – 52

If your extra costs during your entire study period have changed from your original application, enter the new costs.

Questions 53 – 67

If your income during your entire study period has changed from your original application, enter the new income.

Question 68

Include financial gifts, income from assets, cashed assets, (Canada Savings Bonds, RRSPs mutual funds, etc.) registered education savings plans (not listed on **Question 63**), net rental income from property you own, insurance settlements, inheritance, educations/savings plans or any other income not listed on **Questions 53 to 67** that you will receive during your study period. If you have received sponsored funding from any other agency not listed above, include the amount here.

If you are a "Group A" dependent student, do not include contributions or education/scholarship plans from parent(s), step-parents/sponsor/legal guardian here. Include this amount on **Question 63**. Do not include child tax benefits, tax refunds, tax rebates or other B.C. Family Bonus. If these are your only sources of "other income", leave the "specify" box blank and enter "0" on **Question 68**.

Questions 69 – 73

If you have sold assets and the net worth has changed during your study period, you must provide documentation showing proof of the sale, and whether the proceeds were used to repay outstanding debt on that asset or if they were used to pay for something else.

If the value of your motor vehicle has changed, enter the revised estimated current value of your motor vehicle in **Section 4, Question 73**. The estimated value of your vehicle is the amount it would sell for on the open market.

If you transfer a motor vehicle to a different person with little or no monetary exchange, the value of your motor vehicle will still be considered. If motor vehicles are sold it is expected that the transaction will be for fair market value.

Transfers must be a sale for fair market value.

Section 5 – Declaration

This is the final section of the Appendix 5. Make sure you sign and date the declaration. It is a legal document and must contain your signature and the date it was signed before it can be processed. The declaration on your original application for assistance applies to the Appendix 5. By signing the Appendix 5, you are agreeing to the original declaration on the application form, as well as agreeing that the information you have given on the Appendix 5 is correct.

Original School Information

Determine whether *Appendix 5: Transfer of School*, *Appendix 7: Request for Reassessment*, or a new application with a withdrawal notification from your school is required (see the information provided on the front page).

This information will help StudentAid BC determine if the student is eligible for funding at the new school.

TUITION REFUNDS

Students who transfer schools may be eligible for a tuition refund as determined by the original school. The tuition refund should be given directly to the student to apply towards the tuition fees at the new school.

Question 19

Indicate if the student attended your school. If YES, go to line 20. If NO, go to line 21.

Question 20

Enter the start date and the date the student last attended. Include Christmas and/or spring break if the student attended the full semester.

Example: The last date the student was in attendance is December 21. The Christmas break begins December 23 and ends on January 2. In this instance, please enter January 2 as the last date attended.

If more than two weeks passes between the last date of attendance at the original school and the start date at the new school, the transfer policy does not apply. The student is considered to have withdrawn from the original school and must submit a new application for the new school.

Please submit a withdrawal notification form to StudentAid BC. This form can be found at www.StudentAidBC.ca

Question 21

Enter the amount of any non-refundable tuition, books and supplies. Enter "0" if none. If none, and no loan or grant funding has been issued by StudentAid BC, do not complete Appendix 5. The student must complete an Appendix 7, "Request for Reassessment".

Questions 22 – 22a

Sign and date Section 2.

Please use the school's official stamp or seal in the box provided at the bottom left-hand corner of page 1.

New School and Program Information

This information will help StudentAid BC determine if the student is eligible for assistance.

Questions 23-28

Enter your school name and address.

Question 29

Indicate if your school is public or private, and if academic or non-academic.

Questions 30-30a

Enter the student's program/faculty, major/department/option.

Questions 31-32

Enter the date the student started attending the new school program and the date the program will end.

New school end date cannot be more than 52 weeks from original school start date.

Question 32a

This box is intended for B.C. private schools only.

Question 33

Enter the percentage of course load in which the student will enrol.

Questions 35-38

Indicate what year the student will be enrolled in, the length of the program, if the program is by correspondence and the type of program.

Question 39

Enter the costs associated with the program, in Canadian dollars.

Question 39a

Actual tuition fees only, do not include any other fee.

Question 39b

Mandatory fees include registration fee, archiving fee, licence exam fee, AMS/Student Society Fees, Association fees. Mandatory fees do NOT include local transportation, medical premiums or student license.

Question 39c

Program related fees include actual books and supplies, kit, personal instruments or tools required for study/practice, computer equipment to a maximum of \$300 per year (software usage charges, repairs, etc.), clothing/uniform, safety equipment shoes/boots and other equipment rental (diving, aviation, photography, etc.).

Question 39d

Exceptional expenses include compulsory trips, practicum costs and clinical experiences.

Please consult the StudentAid Policy and Procedure manual available online at www.StudentAidBC.ca or contact StudentAid BC for further information.

Question 40

Indicate the value of any awards, in Canadian dollars, that the student will receive from your school.

Questions 41-41a

Sign and date Section 3

Use the official stamp or seal of your school at the top right-hand corner of Page 2.

SECTION 4 – YOUR STUDY PERIOD: Extra costs, income and assets (to be completed by the student)

- (43) Between the date classes start (Question 20) and the date classes end (Question 32), will you be on a co-op/paid work term? (43) ☐ YES ☐ NO
- (48) While you are in school, will you be living with your parent(s)/step-parent/sponsor/legal guardian or living in a home owned or rented by them? Read ① page 15 (48) ☐ YES ☐ NO
- (49) Have any of your extra costs, income and/or assets changed from your original application? (49) ☐ YES (if YES complete Questions 50 to 73) ☐ NO (if NO, go to Section 5)

ALLOWABLE EXTRA COSTS: Enter study period totals (Questions 20 and 32), not monthly amounts.

- | | STUDY PERIOD TOTALS |
|--|--|
| (50) Total day-care costs for your child(ren) 11 years or younger. Include child-care subsidy from Question 64. (Only one parent may claim day-care costs) (50) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (51) Child support and/or spousal support payments you will receive (51) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (52) If you must relocate to a different city to attend school and you will return home at least once during your study period, what is the cost of your return trip home? (52) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |

INCOME: Enter study period totals (Questions 20 and 32), not monthly amounts. Enter '0' if none.

- | | STUDY PERIOD TOTALS |
|---|--|
| (53) Co-op/paid work term earnings (declare earnings if you answered YES to Question 43) (53) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (54) Assistantships/stipends (54) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (55) Gross earnings you expect to have from employment and net self-employment income during your entire study period . Do not include income reported on lines 53 and 54 (55) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (56) Child support and/or spousal support payment you will receive (56) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (57) Employment Insurance benefits (EI). (Do not include sponsored tuition/books) (57) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (58) Bursaries or needs-based academic awards (58) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (59) WorkSafe BC/WCB benefits (59) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (60) Pension income from Children's Benefits (previously "Orphan's Benefits"), Canada Pension Plan (CPP), retirement pensions, disability pensions, or any other pension. Read ① page 17 (60) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (61) Scholarships or merit-based awards, including Passport to Education and provincial government scholarship (61) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (62) First Nation band funding (do not include sponsored tuition/books) (62) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (63) All contributions from parent(s)/step-parent/sponsor/legal guardian including registered education savings plans (RESPs) and scholarship trust funds (63) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (64) Child-care subsidy. (Only one parent may claim child-care subsidy) (64) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (65) Sponsored tuition/books from Employment and Social Development Canada (ESDC-formerly HRSDC), First Nation bands, Ministry of Social Development & Social Innovation, other government agencies & employers (65) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (66) Income assistance (welfare) and/or B.C. income assistance for persons with disabilities. (Do not include amount entered on Question 11a of Appendix 2) (66) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (67) Employment program of British Columbia (EPBC) (67) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (68) All other sources of income (e.g. net rental income, insurance settlements, etc.) Do not include tax rebates, child tax benefits, tax refunds or B.C. Family Bonus. Read ① page 19 Specify: <input type="text"/> (68) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |

Report ALL Canadian and foreign assets. Include 'locked-in' assets.

- | | |
|---|--|
| (69) What is the net worth of your RRSPs? Enter '0' if none (69) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (70) What is the net worth of all your term deposits, GICs, mutual funds, stocks, bonds, etc.? Do not include RRSPs. Enter '0' if none (70) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (71) What is the net worth (your share) of any assets such as revenue/holding/recreational properties, boat, RV, etc.? Do not include principal residence and motor vehicle(s) reported in Question 73 and 73a. Enter '0' if none (71) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (72) What is the net worth (your share) of a business? Enter '0' if none (72) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |
| (72a) Enter your reported gross income from line 150 of your 2013 Income Tax Return. If you did not file a 2013 Income Tax Return, enter your total gross income from all sources both inside and outside of Canada. This income will be matched with Canada Revenue Agency Records, which may affect your assessment of need. Read ① page 21 (72a) | \$ <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> .00 |

SECTION 4 – YOUR STUDY PERIOD: Extra costs, income and assets CONTINUED

MOTOR VEHICLES (Read ① page 21) You must answer BOTH Questions 73 and 73a.

(73) Do you own a car/truck/motorcycle/other motor vehicle of which you are the registered owner? Uninsured vehicles must be declared (73) ☐ YES (give details below) and answer Question 73a ☐ NO (you must answer Question 73a)

OWN:

YEAR	MAKE AND MODEL	TYPE	PURCHASE DATE		PURCHASE PRICE	RESALE VALUE
			YEAR	MONTH		
2012	Acura CSX	4dr Sedan	2	0	\$ 2 2 5 0 0 .00	\$ 2 0 3 5 0 .00
					\$.00	\$.00
					\$.00	\$.00

ANSWER BOTH QUESTIONS

(73a) Do you lease a car/truck/motorcycle/other motor vehicle of which you are the registered lessee? Uninsured vehicles must be declared (73a) ☐ YES (give details below) ☐ NO

LEASE:

YEAR	MAKE AND MODEL	TYPE	LEASE DATE		VEHICLE VALUE AT LEASE DATE	MONTHLY LEASE PAYMENTS
			YEAR	MONTH		
2012	Acura CSX	4dr Sedan	2	0	\$ 2 2 5 0 0 .00	\$ 4 2 5 .00
					\$.00	\$.00
					\$.00	\$.00

All information is subject to audit and verification.

SECTION 5 – DECLARATION (To be completed by the student)

This Appendix forms part of the student's Application for student financial assistance. As such, the Student Declaration and Canada Revenue Agency Consent previously signed by the student have full legal force and effect in respect of this Appendix.



(85) SIGNATURE OF STUDENT

MUST BE SIGNED

PRINT NAME

PRINT HERE

(86) DATE SIGNED

YEAR	MONTH	DAY
<input type="text"/>	<input type="text"/>	<input type="text"/>

DEADLINE

Your complete and correct Appendix 5 must be received by the StudentAid BC at least 6 weeks before the new study end date shown in Question 32.

Collection and use of information. The information included in this form and authorized above is collected under Section 26c of the *Freedom of Information and Protection of Privacy Act*, and under the authority of the *Canada Student Financial Assistance Act*, R.S.C. 1994, Chapter C-28 and StudentAid BC. The information provided will be used to determine eligibility for a benefit through StudentAid BC. If you have any questions about the collection and use of this information, contact StudentAid BC, Ministry of Advanced Education, PO Box 9173, Stn Prov Govt, Victoria BC, V8W 9H7, telephone 1-800-561-1818 (toll-free in Canada/U.S.) or (250)-387-6100 from outside North America.

CONTACT INFORMATION

TO REACH StudentAid BC BY PHONE:

Call **1-800-561-1818** toll free from in Canada or USA

Or

250-387-6100 from outside North America

TO REACH StudentAid BC BY MAIL:

StudentAid BC

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Visit us on-line at www.StudentAidBC.ca