

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break in studies between your original school and your new school is more than two weeks, you are considered to have withdrawn from your original school.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 3 – NEW SCHOOL AND PROGRAM INFORMATION

(23) SCHOOL NAME

EMAIL ADDRESS OF FINANCIAL AID OFFICE OR REGISTRAR'S OFFICE

SCHOOL CODE

PROGRAM CODE

(24) MAILING ADDRESS OF FINANCIAL AID OFFICE OR REGISTRAR'S OFFICE

(25) CITY/TOWN

(26) POSTAL/ZIP CODE

AREA CODE

TELEPHONE NUMBER (Financial Aid Office)

OFFICIAL STAMP OR SEAL OF SCHOOL

STAMP/SEAL HERE

(27) PROVINCE/STATE

AREA CODE

AREA CODE

FAX NUMBER (Financial Aid Office)

(28) COUNTRY

(29) TYPE OF SCHOOL - MARK ONE

(30) PROGRAM/FACULTY

(30a) MAJOR DEPARTMENT/OPTION

(32a) TOTAL WEEKS

(33) STUDENT'S INTENDED COURSE LOAD

%

NEW SCHOOL END DATE CANNOT BE MORE THAN 52 WEEKS FROM ORIGINAL SCHOOL START DATE (SEE QUESTION 20).

(31) DATE CLASSES START

YEAR

MONTH

DAY

(32) DATE CLASSES END

YEAR

MONTH

DAY

TO

(34) Prior learning assessment.....

YES NO

(35) What year will the student be in? (e.g., 1st, 2nd, 3rd, 4th, etc.).....

YEAR

(36) How long is the program? (if less than 60 weeks, mark '1' in box.)

YEAR(S)

(37) Is this a correspondence/distance education program?.....

YES NO

(38) Program type (mark one).....

CERTIFICATE A

ASSOCIATE/ DIPLOMA B

UNIVERSITY TRANSFER C

BACHELOR D

MASTER E

DOCTORATE F

PROFESSIONAL G

UNCLASSIFIED/ QUALIFYING H

(39) Total costs: **must be shown in Canadian dollars.**

(a) Actual tuition. Do not deduct any sponsored tuition amount (39a) \$.00

(b) Mandatory fees. Do not include optional fees..... (39b) \$.00

(c) Program related costs (39c) \$.00

(d) Exceptional Expenses (39d) \$.00

(40) Student awards: **must be shown in Canadian dollars.**

(a) What is the amount of scholarship(s) the student will receive from your school? (40a) \$.00

(b) What is the amount of bursaries the student will receive from your school? (40b) \$.00

(c) What is the amount of teaching/research assistantship income the student will receive from your school? (40c) \$.00

(d) What is the amount of institutional funded employment program income the student will receive from your school? (40d) \$.00

(41) SIGNATURE OF SCHOOL OFFICIAL MUST BE SIGNED	PRINT NAME PRINT HERE	(41a) DATE SIGNED YEAR <input type="text"/> MONTH <input type="text"/> DAY <input type="text"/>
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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)	<input type="checkbox"/> YES	<input type="checkbox"/> 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)	<input type="checkbox"/> YES	<input type="checkbox"/> NO
(49) Have any of your extra costs, income and/or assets changed from your original application?	(49)	<input type="checkbox"/> YES (If YES complete Questions 50 to 73)	<input type="checkbox"/> 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"/>	.00
(51) Child support and/or spousal support payments you will receive.....	(51)	\$ <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"/>	.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"/>	.00
(54) Assistantships/stipends	(54)	\$ <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"/>	.00
(56) Child support and/or spousal support payment you will receive	(56)	\$ <input type="text"/>	.00
(57) Employment Insurance benefits (EI). (Do not include sponsored tuition/books)	(57)	\$ <input type="text"/>	.00
(58) Bursaries or needs-based academic awards	(58)	\$ <input type="text"/>	.00
(59) WorkSafe BC/WCB benefits	(59)	\$ <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"/>	.00
(61) Scholarships or merit-based awards, including Passport to Education and provincial government scholarship.....	(61)	\$ <input type="text"/>	.00
(62) First Nation band funding (do not include sponsored tuition/books)	(62)	\$ <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"/>	.00
(64) Child-care subsidy. (Only one parent may claim child-care subsidy).....	(64)	\$ <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"/>	.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"/>	.00
(67) Employment program of British Columbia (EPBC)	(67)	\$ <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"/>	.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"/>	.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"/>	.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"/>	.00
(72) What is the net worth (your share) of a business? Enter '0' if none.....	(72)	\$ <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"/>	.00

