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BRITISH COLUMBIA StudentAidBC

The symbol (i) means to read the 2015/2016 INSTRUCTIONS booklet included in the application package and available online at www.StudentAidBC.ca.

Appendix 5

TRANSFER OF SCHOOL

PURPOSE	HOW TO COMPLETE THE APPENDIX 5
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.	 Complete Sections 1, 4 and 5, then submit this completed Appendix 5 – Transfer of School form to the original school. 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. 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"?	WHEN SHOULD I COMPLETE AN APPENDIX 7 "REQUEST FOR REASSESSMENT TO CHANGE SCHOOLS"?
If you have already received funding from StudentAid BC for your 2015/2016 application; and	If you have not received loans or grant funding from StudentAid BC for your 2015/16 application.
If your school has already confirmed your enrolment; and	You do not have any non-refundable tuition/book costs.
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.	

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break in studies between your original school and your new school is more than two weeks, you are considered to have withdrawn from your original school.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.

TO BE COMPLETED BY THE STUDENT

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 <u>after</u> the first day of classes cannot be considered. If you move from your parent's home <u>before</u> 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 <u>either</u> 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 "o" 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.

SECTION 2: TO BE COMPLETED BY THE ORIGINAL SCHOOL

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 "o" 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.

SECTION 3: TO BE COMPLETED BY THE NEW SCHOOL

New School and Program Information

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

Question 23-28

Enter your school name and address.

Question 39a

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

Question 29

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

Question 30-30a

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

Question 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 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 <u>www.StudentAidBC.ca</u> 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 righthand corner of Page 2.

Appendix 5 TRANSFER OF SCHOOL

2015/2016



BRITISH COLUMBIA StudentAidBC

Canada

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and available online at www.StudentAidBC.ca.

SECTION 1 – PERSONAL INFORMATION	JN	
(01) LAST NAME NOTE: Your last name MUST match the name	(12) SOCIAL INSURANCE NUMBER	
(02) FIRST NAME NOTE: Your last name MUST match the name	e on your Social Insurance Number card/letter MIDDLE INITIAL	
		(13) ORIGINAL APPLICATION NUMBER
(03) MAILING ADDRESS All mail will be sent to	this address	2015
	JMBER AND STREET NAME/PO BOX	
		(14) IS THIS A CHANGE OF ADDRESS?
(04) Use this line for any part of your address no	t indicated above	YES NO
(05) Use this line for any part of your address no	t indicated above	(15) NEW STUDENT NUMBER (IF KNOWN)
(06) CITY/TOWN		
		(16) PROGRAM/FACULTY AT NEW SCHOOL
(07) PROVINCE/STATE	(08) POSTAL/ZIP CODE	7
		(17) MAJOR/DEPARTMENT/OPTION AT
(09) COUNTRY		NEW SCHOOL
(10) AREA CODE TELEPHONE NUMBER		
(11) E-MAIL ADDRESS Notifications will be sent to	o this address	STUDENT MUST ALSO COMPLETE
		SECTIONS 4 AND 5
	OPMATION	
SECTION 2 – ORIGINAL SCHOOL INFO		
TO BE COM	ORMATION PLETED BY AN OFFICIAL AT YOUR ORIGI	NAL SCHOOL
TO BE COM	PLETED BY AN OFFICIAL AT YOUR ORIGINAL AT Y	
TO BE COM (18) NAME OF SCHOOL (19) Did the student attend your school? I confirm that the student has been attending f	PLETED BY AN OFFICIAL AT YOUR ORIGI	NO (if NO, complete <i>Questions 21, 22</i> and <i>22a</i>)
TO BE COM (18) NAME OF SCHOOL (19) Did the student attend your school? I confirm that the student has been attending f the student attended the full semester):	PLETED BY AN OFFICIAL AT YOUR ORIGIN YES (if YES, complete Questions 20, 21, 22 and 22a) ull-time studies for the period indicated be	NO (if NO, complete Questions 21, 22 and 22a) NO (include Christmas and/or spring break if
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SECTION 3 – NEW SCHOOL AND PROG	RAM INFORMATION	
(23) SCHOOL NAME		
EMAIL ADDRESS OF FINANCIAL AID OFFICE OR REGIST	RAR'S OFFICE	PROGRAM CODE
(24) MAILING ADDRESS OF FINANCIAL AID OFFICE OF	REGISTRAR'S OFFICE	
		OFFICIAL STAMP OR SEAL OF SCHOOL
(25) CITY/TOWN	(26) POSTAL/ZIP CODE	STAMP/SEAL HERE
(27) PROVINCE/STATE	AREA CODE TELEPHONE NUMBER (Financial Aid Of	ffice) AREA CODE FAX NUMBER (Financial Aid Office)
(28) COUNTRY	(29) TYPE OF SCHOO	
	A PUBLIC ACADEMIC	B PRIVATE C PUBLIC D PRIVATE NON-ACADEMIC D NON-ACADEMIC
(30) PROGRAM/FACULTY	(30a) MAJOR DEPARTM	
(31) DATE CLASSES START (32) DAT YEAR MONTH DAY YEA	TE CLASSES END	W SCHOOL FND DATE CANNOT BE MODE
ΤΟ		EW SCHOOL END DATE CANNOT BE MORE 1AN 52 WEEKS FROM ORIGINAL SCHOOL
(32a) TOTAL WEEKS (33) STUDENT'S IN	TENDED COURSE LOAD	ART DATE (SEE QUESTION 20).
	%	
(34) Prior learning assessment		
(35) What year will the student be in? (e.g., 1 st , 2 nd , 2	3 rd , 4 th , etc.)	YEAR
(36) How long is the program? (if less than 60 weeks	s, mark '1' in box.)	
(37) Is this a correspondence/distance education pro	ogram?	
	ASSOCIATE/ UNIVERSITY	UNCLASSIFIED/
(38) Program type (mark one) A	DIPLOMA TRANSFER BACHELOR MASTER	DOCTORATE PROFESSIONAL QUALIFYING
(39) Total costs: must be shown in Canadian dollar	rs.	
(a) Actual tuition. Do not deduct any sponsor	ed tuition amount	
(b) Mandatory fees. Do not include optional f	ees	
(c) Program related costs		
(d) Exceptional Expenses		.(39d) \$.00
(40) Student awards: must be shown in Canadian of	dollars.	
(a) What is the amount of scholarship(s) the st	udent will receive from your school?	
(b) What is the amount of bursaries the studer	nt will receive from your school?	(40b) \$.00
(c) What is the amount of teaching/research as will receive from your school?	-	(40c) \$.00
(d) What is the amount of institutional funded		
will receive from your school?		e 0.00
(41) SIGNATURE OF SCHOOL OFFICIAL	PRINT NAME	(41a) DATE SIGNED
MUST BE SIGNED	PRINT HERE	YEAR MONTH DAY

SECTION 4 – YOUR STUDY PERIOD: Extra costs, income and assets (to be completed b	y the s	tudent)	
(43) Between the date classes start (<i>Question 20</i>) and the date classes end (<i>Question 32</i>), will you be on a co-op/paid work term?		YE	5 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		YE	S (If YES complete
(49) Have any of your extra costs, income and/or assets changed from your original application?	.(49)	Que	stions 50 to 73) (if NO, go to tion 5)
ALLOWABLE EXTRA COSTS: Enter study period totals (Questions 20 and 32), not monthly amount	nts.	STUDY PERIO	
(50) Total day-care costs for your child(ren) 11 years or younger. Include child-care subsidy from	a		
<i>Question</i> 64. (Only one parent may claim day-care costs)	\$.00
(51) Child support and/or spousal support you will receive(51)	\$.00
(52) If you must relocate to a different city to attend school and you will return home at	e [
least once during your study period, what is the cost of your return trip home	\$.00
INCOME: Enter study period totals (Questions 20 and 32), not monthly amounts. Enter '0' if nor	ne.	STUDY PERIO	D TOTALS
 (53) Coop/paid work term earnings (declare earnings if you answered YES to <i>Question</i> 43)	\$.00
(55) Gross earnings you expect to have from employment and net self-employment income during	\$.00
your entire study period . Do not include income reported on lines 53 and 54	\$.00
(56) Child support and/or spousal support payment you will receive			
(57) Employment insurance benefits (EI). (Do not include sponsored tuition/books)	\$.00
(58) Bursaries or needs-based academic awards	\$.00
(59) WorkSafe BC/WCB benefits	\$.00
(60) Pension income from Children's Benefits (previously "Orphan's Benefits"), Canada Pension	\$.00
Plan (CPP), retirement pensions, disability pensions, or any other pension. Read (1) page 17(60)	Г		
(61) Scholarships or merit-based awards, including Passport to Education and provincial government	\$.00
Scholarship	+ [
(62) First Nation band funding (do not include sponsored tuition/books	\$.00
(63) All contributions from parent(s)/step-parent/sponsor/legal guardian including registered	\$.00
education savings plans (RESPs) and scholarship trust funds (63)	Г		
(64) Child-care subsidy. (Only one parent may claim child-care subsidy)	\$.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	\$.00
and employers	\$.00
 (66) Income assistant (welfare) and/or B.C. income assistance for persons with disabilities. (Do not include amount entered on <i>Question 11a</i> of <i>Appendix 2</i>)	Г		
	\$.00
(67) Employment program of British Columbia (EPBC)	\$.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	r		
B.C. Family Bonus. Read (1) page19	\$.00
Report ALL Canadian and foreign assets. Include 'locked-in' assets.			
(69) What is the net worth of your RRSPs? Enter 'o' if none	\$.00
(70) What is the net worth of all your term deposits, GICs, mutual funds, stocks, bonds, etc.?	*		
Do not include RRSPs. Enter 'o' if none	\$.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 vehicles(s) reported			
in <i>Question</i> 73 and 73 <i>a</i> . Enter 'o' if none	\$.00
(72) What is the net worth (your share) of a business? Enter 'o' if none	\$.00
(72a)Enter your reported total income from line 150 of your 2014 Income Tax Return. If you did not file a 2014 Income Tax Return, enter your total 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	\$.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.

u are YES (give details below)

and answer Question 73a

NO (you must answer Question 73a)

	OWN:																			
	YEAR	MAKE AND MODEL	TYPE		PUR YEA	CHASE [NTH		PUI	RCHA	SE PF	RICE				RESAL	E VAL	UE	
	2013	Acura CSX	4dr Sedan	2		1 3	0	6 \$	_	2	5	0			\$ 2	2 (0 3	5		
Т				_ _			_	\$	-	-				.00		+	_	-	.00	
T								\$.00	\$	_		_	.00	
•		BOTH QUESTIONS		- historia - A	.l. : .l.	ana Lin										1				
(73	the regis	ease a car/truck/motorcy tered lessee? Uninsured v	cle/other motor ve vehicles must be d	enicle of w eclared	nich	you ar	e 3a)		/ES	(give	detai	ls bel	low)			N	0			
	LEASE:																			
	YEAR	MAKE AND MODEL	TYPE			EASE DA					ICLE					N	NONT	HLY LE MENT	ASE	
	2013	Acura CSX	4dr Sedan	2	VEA 0	R 1 3	0	6\$	2	2	EASE	0	0.	.00	\$		4		5.00	
								\$.00	\$.00	
								\$.00	\$.00	
			All informatio	on is subje	ect to	audit	and	verific	atio	on.										
SE	CTION 5	- DECLARATION (1	o be complet	ed by th	10 ST	tuder	nt)													
96	chiens	DECEMINITON	o be complet	cubyti	ie si	luuei	ie/													
Thi	s Appendi>	forms part of the stud	ent's Applicatior	n for stud	ent f	inanci	al as	sistan	ce. /	As si	uch,	the	Stu	ıder	nt De	claı	ratio	n an	d	
Car	nada Rever	nue Agency Consent pr	eviously signed b	y the stu	dent	have	^f ull le	egal fo	rce	anc	d effe	ect i	in re	espe	ect of	fth	is Ap	pen	dix.	
	(0.)			DOINT	45							0.0	-							
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		MUST BE SIGI	NED		PF	RINT	HE	RE												
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