# Appendix 5



TRANSFER OF SCHOOL



The symbol ① means to read the 2016/2017 INSTRUCTIONS booklet included in the application package and available online at www.StudentAidBC.ca.

PURPOSE	HOW TO COMPLETE THE APPENDIX 5		
If you are in receipt of StudentAid BC funding, the Appendix 5 "Transfer of School" allows you to transfer to a different school during the study period without the necessity of	<ol> <li>Complete Sections 1, 4 and 5, then submit this completed Appendix 5 – Transfer of School form to the original school.</li> </ol>		
having to re-apply for student financial assistance.	<ol><li>Your original school completes Section 2. The appendix is either mailed to your new school or returned to you with</li></ol>		
Section 1, 4 and 5 are to be completed by you.	instructions to take it to your new school.		
Section 2 is to be completed by your original school.	3) Your new school completes Section 3 and forwards the appendix to StudentAid BC.		
Section 3 is to be completed by your new school.			
	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"?		
APPENDIX 5 "TRANSFER OF SCHOOL"?  If you have already received funding from StudentAid BC	"REQUEST FOR REASSESSMENT TO CHANGE SCHOOLS"?  If you have not received loans or grant funding from		
APPENDIX 5 "TRANSFER OF SCHOOL"?  If you have already received funding from StudentAid BC for your 2016/2017 application; and	"REQUEST FOR REASSESSMENT TO CHANGE SCHOOLS"?  If you have not received loans or grant funding from StudentAid BC for your 2015/2016 application.		
APPENDIX 5 "TRANSFER OF SCHOOL"?  If you have already received funding from StudentAid BC for your 2016/2017 application; and  If your school has already confirmed your enrolment; and  The break between studies at your original school and	"REQUEST FOR REASSESSMENT TO CHANGE SCHOOLS"?  If you have not received loans or grant funding from StudentAid BC for your 2015/2016 application.		

#### 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break in studies between your original school and your new school is more than two weeks, you are considered to have withdrawn from your original school.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/common-law partner complete an Appendix 2 and attach it 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 either one of the following options:

A. If you are living in a residence at your school, make sure your school places their official school stamp or seal on the form,

#### OR

B. If you are not living in 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. Online bank statements may be accepted. All other online statements provided must bear the financial institution's bank/branch stamp. All banking documentation must have your name as the account holder.

#### **Question 50 – 52**

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

#### **Question 53 – 57**

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.), net rental income from property you own, insurance settlements, inheritance, 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 dependent (Group A) student, do not include contributions or education/scholarship plans from parent(s)/ step-parent/sponsor/legal guardians 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*.

# **Question 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 <a href="https://www.StudentAidBC.ca">www.StudentAidBC.ca</a>

### 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.

#### **Question 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.

## 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 BC Policy manual available at: <a href="https://www.StudentAidBC.ca">www.StudentAidBC.ca</a> or contact StudentAid BC for further information.

#### **Question 40**

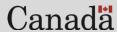
Indicate the value of any awards, in Canadian dollars, that the student will receive from your school.

#### 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.

# Appendix 5



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SECTION 1 – PERSONAL INFORMA	ATION	
(01) LAST NAME NOTE: Your last name MUST match the name on y	our Social Insurance Number card/letter	(12) SOCIAL INSURANCE NUMBER
(02) FIRST NAME NOTE: Your first name MUST match the name on (03) MAILING ADDRESS All mail will be sent to this address.		(13) ORIGINAL APPLICATION NUMBER
` '	ND STREET NAME/PO BOX	(14) IS THIS A CHANGE OF ADDRESS?  YES NO
(05) Use this line for any part of your address <b>not</b> indica		(15) NEW STUDENT NUMBER (IF KNOWN)
(06) CITY/TOWN		(16) PROGRAM/FACULTY AT NEW SCHOOL
(07) PROVINCE/STATE	(08) POSTAL/ZIP CODE	
(09) COUNTRY		(17) MAJOR/DEPARTMENT/OPTION AT NEW SCHOOL
(10) AREA CODE TELEPHONE NUMBER		
(11) EMAIL ADDRESS Notifications will be sent to this a	ddress	STUDENT MUST ALSO COMPLETE SECTION 4 AND 5
SECTION 2 – ORIGINAL SCHOOL IN	IFORMATION	
TO BE COM	NFORMATION  MPLETED BY AN OFFICIAL AT YOUR ORIGI	NAL SCHOOL
		NAL SCHOOL
TO BE COM (18) NAME OF SCHOOL		NAL SCHOOL  NO (if NO, complete <i>Questions 21, 22 and 22a</i> )
TO BE COM (18) NAME OF SCHOOL	YES, complete Questions 20, 21, 22 and 22a)	NO (if NO, complete <i>Questions 21, 22 and 22a</i> )
(18) NAME OF SCHOOL  (19) Did the student attend your school?  YES (if I confirm that the student had been attending full student attended the full semester):	YES, complete <i>Questions 20, 21, 22 and 22a</i> ) I-time studies for the period indicated below (	NO (if NO, complete <i>Questions 21, 22 and 22a</i> )
(18) NAME OF SCHOOL  (19) Did the student attend your school?  YES (if I confirm that the student had been attending full student attended the full semester):	YES, complete <i>Questions 20, 21, 22 and 22a</i> ) I-time studies for the period indicated below (	NO (if NO, complete <i>Questions 21, 22 and 22a</i> ) include Christmas and/or spring break if the UNTS PAID DURING THIS PERIOD OF FULL-TIME STUDIES
TO BE COM  (18) NAME OF SCHOOL  (19) Did the student attend your school? YES (if  I confirm that the student had been attending full student attended the full semester):  (20) START DATE AT ORIGINAL SCHOOL DATE S	TPLETED BY AN OFFICIAL AT YOUR ORIGINAL	NO (if NO, complete <i>Questions 21, 22 and 22a</i> ) include Christmas and/or spring break if the JINTS PAID DURING THIS PERIOD OF FULL-TIME STUDIES ABLE TUITION BOOKS AND SUPPLIES
TO BE COM  (18) NAME OF SCHOOL  (19) Did the student attend your school? YES (if  I confirm that the student had been attending full student attended the full semester):  (20) START DATE AT ORIGINAL SCHOOL  YEAR MONTH DAY YEAR	YES, complete <i>Questions 20, 21, 22 and 22a</i> )  I-time studies for the period indicated below (  TUDENT LAST ATTENDED (21) TOTAL AMOU  MONTH DAY SON-REFUND  NON-REFUND  STUDENT LAST ATTENDED (21) TOTAL AMOU	NO (if NO, complete <i>Questions 21, 22 and 22a</i> ) include Christmas and/or spring break if the UNTS PAID DURING THIS PERIOD OF FULL-TIME STUDIES BOOKS AND SUPPLIES
TO BE COM  (18) NAME OF SCHOOL  (19) Did the student attend your school? YES (if  I confirm that the student had been attending full student attended the full semester):  (20) START DATE AT ORIGINAL SCHOOL  YEAR MONTH DAY YEAR  (22) SIGNATURE OF SCHOOL OFFICIAL	TPLETED BY AN OFFICIAL AT YOUR ORIGINAL	NO (if NO, complete <i>Questions 21, 22 and 22a</i> ) include Christmas and/or spring break if the  UNTS PAID DURING THIS PERIOD OF FULL-TIME STUDIES ABLE TUITION BOOKS AND SUPPLIES  0.00 \$ .00

#### (23) SCHOOL NAME SCHOOL CODE PROGRAM CODE EMAIL ADDRESS OF FINANCIAL AID OFFICE OR REGISTRAR'S OFFICE VISIT www.StudentAidBC.ca to find codes (24) MAILING ADDRESS OF FINANCIAL AID OFFICE OR REGISTRAR'S OFFICE OFFICIAL STAMP OR SEAL OF SCHOOL **STAMP/SEAL HERE** (25) CITY/TOWN (26) POSTAL/ZIP CODE TELEPHONE NUMBER (Financial Aid Office) AREA CODE (27) PROVINCE/STATE (28) COUNTRY (29) TYPE OF SCHOOL - MARK ONE C PUBLIC NON-ACADEMIC D PRIVATE NON-ACADEMIC A PUBLIC ACADEMIC B PRIVATE ACADEMIC (30) PROGRAM/FACULTY (30a) MAJOR/DEPARTMENT/OPTION (31) DATE CLASSES START (32) DATE CLASSES END **NEW SCHOOL END DATE CANNOT BE** TO MORE THAN 52 WEEKS FROM ORIGINAL **SCHOOL START DATE (SEE QUESTION 20)** (33) STUDENT'S INTENDED COURSE LOAD (32a) TOTAL WEEKS % (34) Prior learning assessment......(34) NO YES (35) What year will the student be in? (e.g., 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, etc.)......(35) YEAR (36) How long is the program? (if less than 60 weeks, mark '1' in box.)......(36) YEAR(S) (37) Is this a correspondence/distance education program?......(37) YES NO CERTIFICATE/ ASSOCIATE/ UNIVERSITY BACHELOR MASTER DOCTORATE PROFESSIONAL CITATION DIPLOMA TRANSFER (38) Program type (mark one)....... В C D (39) Total costs: must be shown in Canadian dollars. .00 (a) Actual tuition. Do not deduct any sponsored tuition amount..... .00 \$ (b) Mandatory fees. Do not include optional fees......(39b) .00 \$ (c) Program related costs......(39c) .00 \$ (d) Exceptional expenses......(39d) (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 \$ .00 (b) What is the amount of bursaries the student will receive from your school?......(40b) \$ (c) What is the amount of teaching/research assistantship income the student \$ .00 will receive from your school?......(40c) (d) What is the amount of institutional funded employment program income the student .00 will receive from your school? ......(40d) (41) SIGNATURE OF SCHOOL OFFICIAL PRINT NAME (41a) DATE SIGNED **MUST BE SIGNED**

SECTION 3 – NEW SCHOOL AND PROGRAM INFORMATION

SECTION 4 – YOUR STUDY PERIOD: Extra costs, income and assets (to be completed by the student)							
(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?		(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 complete ns 50 to 73		
				NO (if N Section			
ALLOWABLE EXTRA COSTS: Enter study period totals (Questions 20 and 32), not monthly am	ounts.						
(50) Total day-care costs for your child(ren) 11 years or younger. Include child-care subsidy from			STUDY P	ERIOD TO			
Question 64. (Only one parent may claim day-care costs)		\$ _		<u> </u>	.00		
(51) Child support and/or spousal support you pay	(51)	\$			.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)	\$			.00		
INCOME: Enter study period totals (Questions 20 and 32), not monthly amounts. Enter '0' if none.  STUDY PERIOD TOTALS							
(53) Coop/paid work term earnings (declare earnings if you answered YES to Question 43)	(53)	\$			.00		
(54) Assistantships/stipends	(54)	\$			.00		
(55) Gross earnings you expect to have from employment and net self-employment income during your entire study  Do not include income reported on lines 53 and 54		\$ <u> </u>			.00		
(56) Child support and/or spousal support payment you will receive	(56)	ş <u>=</u>	1 1		.00		
(57) Employment insurance (EI) benefits. (Do not include sponsored tuition/books)		\$		+	.00		
(58) Bursaries or needs-based academic awards	(58)	s			.00		
(59) WorkSafe BC benefits		Ś			.00		
(60) Pension income from Children's Benefits, Canada Pension Plan (CPP), retirement pensions, disability pensions, or any other pension. Read ① page 17	(60)	\$ <u></u>		<del> </del>	.00		
(61) Scholarships or merit-based awards, including Passport to Education and provincial government Scholarship		\$ <u></u>			.00		
(62) First Nation band funding (do not include sponsored tuition/books)		\$			.00		
(63) Contributions from parent(s)/step-parent/sponsor/legal guardian FOR THIS STUDY PERIOD. Read (i) page 17.	(02)	· L					
(a) All contributions including total RESPs and scholarship trust funds	(63a)	\$		<u> </u>	.00		
scholarship trust funds	(63b)	\$			.00		
(64) Child-care subsidy. (Only one parent may claim child-care subsidy)	(64)	\$			.00		
(65) Sponsored tuition/books from Employment and Social Development Canada (ESDC), First Nation bands, Ministry of Social Development & Social Innovation, other government agencies and employers	(65)	\$			.00		
(66) Income assistant (welfare) and/or B.C. income assistance for persons with disabilities.		_					
(Do not include amount entered on <i>Question 11a of Appendix 2</i> )	, ,	\$		<del></del>	.00		
(67) Employment program of British Columbia (EPBC)	(67)	\$			.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 page19	(68)	\$			.00		
Report ALL Canadian and foreign assets. (Include 'locked-in' assets).							
(69) What is the <b>net</b> worth of your RRSPs? Enter '0' if none	(69)	\$			.00		
(70) What is the <b>net</b> worth of all your term deposits, GICs, mutual funds, stocks, bonds, etc.?  Do not include RRSPs. Enter '0' if none	(70)	s			.00		
(71) What is the <b>net</b> 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 Question 73 and 73a. Enter '0' if none	(71)	\$			.00		
(72) What is the <b>net</b> worth (your share) of a business? Enter '0' if none	(72)	\$			.00		
(72a) Enter your reported total income from line 150 of your 2015 Income Tax Return. If you did not							
file a 2015 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 (2) page 21	(725)	sГ		$\overline{}$	.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? YES (give details below) NO (you must answer Uninsured vehicles must be declared....... ....(73) Question 73a) and answer Question 73a OWN: **PURCHASE DATE** MAKE AND MODEL **TYPE PURCHASE PRICE RESALE VALUE** YEAR YEAR MONTH \$ .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? YES (give details below) Uninsured vehicles must be reported.......(73a) LEASE: LEASE DATE **VEHICLE VALUE AT MONTHLY LEASE** YEAR MAKE AND MODEL **TYPE** YEAR MONTH LEASE DATE **PAYMENTS** .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 PRINT NAME (86) DATE SIGNED **MUST BE SIGNED DEADLINE** Your complete and correct Appendix 5 must be received by StudentAid BC at least six 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 Sections 26c and 26e 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 and for statistical and evaluation purposes. If you have any questions about the collection and use of this information, contact the Director, StudentAid BC, Ministry of Advanced Education, PO Box 9173, Stn Prov Govt, Victoria B.C., 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: TO REACH StudentAid BC BY MAIL: StudentAid BC Call 1-800-561-1818 toll-free from in Canada or USA Mailing address: PO Box 9173 Stn Prov Govt Victoria BC V8W 9H7 250-387-6100 from outside North America Courier address: StudentAid BC 1<sup>st</sup> Floor, 835 Humboldt Street Victoria B.C. V8V 4W8

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