



ST HELEN & ST KATHARINE

BURSARY APPLICATION FORM

(New applicants)

Confidential Statement of Financial Circumstances

Please read the Guidance Notes at the end of this document before completing this form.

ASSESSING YOUR APPLICATION

The school reserves the right to make all decisions regarding your application for a Bursary and will assess your renewal application internally.

This means that, for the purposes of your application, the school is the Controller of your information.

PLEASE NOTE THAT NO APPLICATION WILL BE CONSIDERED UNLESS THE PROCESS AS DETAILED BELOW IS FOLLOWED.

IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF PERSONAL AND FINANCIAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD OF THE APPLICATION AND ANY OTHER CHILDREN OF THE FAMILY, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS, THE CHILD AND ANY OTHER CHILDREN OF THE FAMILY IN LINE WITH THE SCHOOL'S PRIVACY NOTICES.

PERSONAL, FINANCIAL AND SENSITIVE DATA RELATING TO THIRD PARTIES MAY NEED TO BE PROCESSED (IF YOU FEEL IT IS NECESSARY), AND YOU WILL NEED TO OBTAIN THE THIRD PARTIES' CONSENT BY ASKING THEM TO SIGN THIS SECTION OF THE APPLICATION FORM.

Your electronic and paper records will be kept securely and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of considering your application for a bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

You are entitled to request that your information be deleted permanently at any time.

It should be noted that the report produced by the School is the property of the School and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

I/we have read the above and consent to my/our and the child's/children's information being processed in the manner described above:

FATHER/STEPFATHER:.....Date:.....

MOTHER/STEPMOTHER:.....Date:.....

1. **CHILD**

- a) Full Names _____
- b) Date of birth _____
- c) Term / year
for entry or
date of joining _____

2. **APPLICANTS** (see note 2)

- | | Parent/Carer 1 | Parent/Carer 2 |
|------------------------------------|-----------------------|-----------------------|
| a) Names and title | _____ | _____ |
| b) HOME address | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| c) Daytime Tel | _____ | _____ |
| d) Evening Tel | _____ | _____ |
| e) Mobile | _____ | _____ |
| f) E-mail | _____ | _____ |
| g) Employer
name | _____ | _____ |
| h) Occupation | _____ | _____ |
| i) Are you a Co.
Director? | | |
| j) Shareholding of
co./business | | |

3. INCOME

(see note 3)

Annual amounts (£)

1

2

Combined

- a) Gross salary
- b) Business profits or self-employed earnings
- c) Gross pensions
- d) Gross investment income
- e) Gross rents received
- f) Benefits received
- g) Maintenance received
- h) Court order / separation agreement – school fees receivable
- i) Benefits in kind received free
- j) Family support
- k) Any other income
- TOTAL**

	1	2	Combined
a) Gross salary			
b) Business profits or self-employed earnings			
c) Gross pensions			
d) Gross investment income			
e) Gross rents received			
f) Benefits received			
g) Maintenance received			
h) Court order / separation agreement – school fees receivable			
i) Benefits in kind received free			
j) Family support			
k) Any other income			
TOTAL			

4. OUTGOINGS

(see note 4)

Annual amounts (£)

1

2

Combined

- a) Tax on incomes above
- b) NI contributions
- c) Pension contributions
- d) Mortgage payments on main residence
- e) Rental property expenses
- f) Household insurances
- g) Rent - main residence
- h) Council Tax and utilities
- i) Loan repayments
- j) Credit card repayments
- k) Food
- l) Clothing
- m) Vehicle costs

	1	2	Combined
a) Tax on incomes above			
b) NI contributions			
c) Pension contributions			
d) Mortgage payments on main residence			
e) Rental property expenses			
f) Household insurances			
g) Rent - main residence			
h) Council Tax and utilities			
i) Loan repayments			
j) Credit card repayments			
k) Food			
l) Clothing			
m) Vehicle costs			

SUMMARY

Income
Deduct Outgoings

TOTAL

Capital Assets
Deduct Capital Liabilities

TOTAL

	1	2	Combined
Income			
Deduct Outgoings			
TOTAL			
Capital Assets			
Deduct Capital Liabilities			
TOTAL			

Please indicate on a separate page **if necessary** why net assets cannot be converted or used to pay school fees

DEPENDENT CHILDREN

(see note 7)

NOTES

7.

- a) Forename
b) DOB
c) Current school
d) Boarding or day
e) Annual fees
f) Compulsory extras
g) Uniforms

SUB TOTAL**(a-g)**

- h) Fees covered by:
i) School scholarships / bursaries / allowances
ii) Family assistance
iii) Other assistance

	Applicant	Child 2	Child 3	Child 4
a) Forename				
b) DOB				
c) Current school				
d) Boarding or day				
e) Annual fees				
f) Compulsory extras				
g) Uniforms				
SUB TOTAL (a-g)				
h) Fees covered by:				
i) School scholarships / bursaries / allowances				
ii) Family assistance				
iii) Other assistance				

iv) Child's income				
SUB TOTAL (hi-iv)				
TOTAL (a-g) LESS (h)				

Please indicate on a separate page **if necessary** why net assets cannot be converted or used to pay school fees

8. OTHER DEPENDENTS (see note 8)

STATEMENT OF AIM

Please indicate how much you feel you can contribute towards school fees each term:

DOCUMENTS TO BE SUPPLIED

Please supply **COPIES** of the following documents:

Last 3 payslips for each applicant

Last P60 for each applicant

Latest **FULL** audited accounts (if appropriate)

Latest interim management accounts (if audited accounts are more than 9 months old)

Latest self-assessment tax calculation **summary** (if appropriate) for each applicant

Schedule D self-employment income declaration (if appropriate) for each applicant

3 months' bank statements for **all accounts**

Proof of value of savings and investments (may include internet valuation)

Latest pension valuation if over 55

Benefit/Tax Credit/Universal Credit letters (if appropriate)

Latest mortgage statement (on all properties if appropriate) / rent agreement

Latest loan statements

Latest credit card statements

Contents insurance schedule

Legal financial agreements

Any other appropriate documents to support your application

ANY ORIGINAL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED. COPY DOCUMENTS WILL BE SHREDDED SECURELY.

YOU WILL BE NOTIFIED THE FINAL RESULT BY THE SCHOOL DIRECTLY

DECLARATION

After having read the attached notes, the following declaration should be signed by all applicant(s) (or see below).

We/I have read the notes and have made a complete declaration of our/my income and assets.

We/I understand that we/I are/am applying for our/my child and accept a place for him/her at the school:

- a) Our/my child's fees account with the school will be credited termly with the amount of the grant
- b) We/I understand that any award or grant is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the forms on the forms sent to us/me by the school or its agent and supply all relevant supporting evidence by the return date indicated
- c) We/I undertake to report immediately any material change in the financial position declared
- d) The grant may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
 - i) there is a breach of the school's Terms and Conditions to the acceptance of a place for our/my child at the school
 - ii) we/I have knowingly and/or recklessly provided false information
 - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated
 - iv) we/I have failed to produce any additional information required by the school or its agent to evidence our/my financial circumstances
 - v) there is in the view of the Head either unsatisfactory work or conduct
 - vi) the school's resources are insufficient to maintain the level of the award

Signatures:

Parent/Carer 1 _____ Date _____

Parent/Carer 2 _____ Date _____

If the above declaration is signed by only one parent/carers, please give reason by deleting as necessary below:

Divorced / separated / widowed

Other (state reason)

Please return this form and all documents to the Deputy Bursar, Alison Jarratt, at ajarratt@shsk.org.uk.

GUIDANCE NOTES

Please read these carefully before completing the Application Form. If you need further help, please contact Bursary Administration.

The numbers below refer to the same numbers on the application form. If you pay tax in any way, please include the appropriate reference number. If any of your assets are held abroad please convert the value to pounds sterling.

2. APPLICANTS

Anyone with care and control of a child can apply for assistance. This person could be:

- the natural father and mother of a child where they live together
- the natural father or mother of a child and their new partner
- the child's appointed Guardian (appointed by a Court)
- the person with whom a child resides and has care and control of the child as a result of a court order or other legal agreement
- the person with whom a child resides and has care and control of the child as a result of an informal agreement

Please note Foster Parents acting under a Full Care Order will be regarded as having no income

Please note if the natural parents are separated and/or divorced both will be required to provide financial information and sign an Application Form, either together or separately

3. INCOME

- a) The gross annual amount of income **FROM ANY SOURCE** for the current or latest financial year
- b) Profits from a business or profession – the gross amount agreed for taxation purposes. Deductions should only be made in respect of capital allowances, losses and stock relief. Please include the latest set of accounts.
- d) All investment income, including building society interest, should be shown gross
- e) Gross income from letting or sub-letting of property
- f) Please list on a separate sheet if necessary all social security benefits, naming their type and how long each have been received for
- g) All income from maintenance payments, separation allowances and Child Support maintenance must be declared. Arrears in any payments will not be taken into account.
- h) Where a parent is required by any Court or legal order to pay part of the school fees then only the part of the fee which is not covered by the order will be used to calculate

any grant awarded. Arrears in any payments of part school fees will not be taken into account.

- i) Include free benefits in kind that are agreed by the Inland Revenue as not being subject to tax
- j) Royalties and all other sources including entertainment and travel allowances

4. OUTGOINGS

- a) Enter income tax and tax on unearned income **TOGETHER**
- c) Enter payments to pension schemes
- d) Enter capital as well as interest payment on a mortgage for the main residence
- e) Enter expenses for any properties you own in addition to the family home
- i) Bank overdraft and other loan charges (please state the purpose of the loan)

5. APPLICANTS' CAPITAL ASSETS

The following will be taken into account:

- a) Monies held on deposit at any bank or building society. The value of investments in stocks and shares at the time of application.
- c) The current market value of the main residence (please estimate)
- d) The current market value of any other properties (please estimate)
- f) If you run your own business or are partners in a business, then you should show the total net worth of the business. Shares in a company not listed on the Stock Exchange should be valued at your share of the net value of the company.

6. APPLICANTS' CAPITAL LIABILITIES

Please detail all other monies owed, together with the lender's name on a separate sheet if necessary

7. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 – 4 for any other dependents.

- e) Please refer to the current academic year
- h) (iii) Please state any other educational allowances received. If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year.
 - (iv) If the child is in receipt of financial assistance from a Trust Deed or other external source please declare the annual amount available, and please enter the gross amount of any interest / share dividends received by the child

8. OTHER DEPENDENTS

Please provide details of any other family members who are financially dependent upon you.

9. ANY OTHER RELEVANT INFORMATION

Please enter, on the sheet provided if necessary, any details which may affect the assessment of the grant, for example a significant change in income or outgoings for the coming year.

YOU MAY WISH TO KEEP A COPY OF YOUR COMPLETED APPLICATION FORM FOR YOUR OWN RECORDS