



**ST HELEN &
ST KATHARINE**



BURSARY ADMINISTRATION LIMITED

on behalf of

THE SCHOOL OF ST HELEN AND 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 - Data Protection considerations

The school reserves the right to make all decisions regarding your application for a Bursary, but employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to make the decision.

This means that, for the purposes of your application:

- the school is the Controller of your information
- BAL is the Processor of your information
- BAL is registered with the Information Commissioner's Office and has satisfied the school as to its arrangements regarding the security of any information and documents you may provide as part of your application.

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 FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:**

1. An Application Form will be completed and sent either to the school or directly to BAL as detailed at the bottom of the form. Supporting paperwork as required must be included.
2. If the Application Form and the supporting paperwork has been sent to the school this will be scanned and forwarded securely to BAL using Microsoft SharePoint so that BAL may prepare the information in the format required by the school.
3. If you have sent the form and supporting documents straight to BAL any original documents will be stored securely under lock and key and then returned to you at the time of the home visit, or if this is not possible BAL will return any original supporting paperwork to you by 'Signed-for' post. Please ensure that you arrange to collect the envelope if a card is left in your letter-box. If any envelopes are returned to BAL as 'uncalled-for' these will be held securely until the papers' whereabouts are queried.
4. BAL will contact you to make arrangements for a home visit if this has been required by the school, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be.
5. BAL will send its report on your application securely to the school through SharePoint and will then withdraw from the process unless the school has any further enquiries it wishes BAL to make.

6. BAL will return an original application form securely to the school, shred any scanned/photocopied evidence documents securely using an authorised service, and scan and store securely on SharePoint its notes regarding your application; these notes will then be shredded securely using an authorised service. This process is undertaken once per year, and any papers (not your original supporting documents) will be held securely until then.
7. Your electronic records will be kept securely on SharePoint, 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.

BAL can arrange to share reports between schools if you are applying to more than one school for a Bursary, but this will not be done without your written permission (email will suffice), and the permission of the school on whose behalf BAL first visited.

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

It should be noted that the report produced by Bursary Administration 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/ours and the child's/children's information being processed in the manner described above:

Date: _____

1. CHILD

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

2. PARENTS (see note 2)

Father/ Stepfather **Mother/ Stepmother**

- a) Names and title _____
- b) Address _____

- c) Occupation _____
- d) Employment Status
Retired - Self-employed -
Employed - Unemployed
(please circle) Retired - Self-employed -
Employed - Unemployed
(please circle)
- e) Employer name _____
- f) Shareholding of business _____
- g) Are you a Co. Director? _____
- h) Daytime Tel _____
- i) Evening Tel _____
- j) Mobile _____
- k) E-mail _____

3. INCOME

(see note 3)

Please use annual amounts

Father £

Mother £

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**

	Father £	Mother £	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)

Please use annual amounts

Father £

Mother £

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 and subsistence
- l) Clothing
- m) Vehicle costs
- n) Leisure
- o) Holidays
- TOTAL**

	Father £	Mother £	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 and subsistence			
l) Clothing			
m) Vehicle costs			
n) Leisure			
o) Holidays			
TOTAL			

5. **CAPITAL ASSETS** (see note 5)

Approximate market value	Father £	Mother £	Combined £
a) i) Bank / building society balances			
ii) Equity / bond values			
iii) PEPs/ISAs/TESSAs			
b) Pension schemes			
c) Value of main residence			
d) Value of other properties			
e) Value of vehicles			
f) Net worth of business			
g) Redundancy settlements due			
h) Insurance settlements due			
TOTAL			

6. **CAPITAL LIABILITIES** (see note 6)

	Father £	Mother £	Combined £
a) Mortgage amount outstanding			
b) Mortgage outstanding on other properties			
c) i) loans			
ii) credit cards			
iii) finance leases			
TOTAL			

SUMMARY	Father £	Mother £	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

7. DEPENDENT CHILDREN

NOTES

(see note 7)

	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)				

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 originals of the following documents:

- Last 3 payslips
- Last P60
- Latest audited accounts (if appropriate)
- Latest management accounts (if audited accounts are more than 9 months old)
- Latest self-assessment tax calculation (if appropriate)
- Schedule D self-employment income declaration (if appropriate)
- 3 months' bank statements
- Proof of value of investments (may include internet valuation)
- Latest pension and endowment valuation
- Benefit letters (if appropriate)

- Latest mortgage statement (on all properties if appropriate) / rent agreement
- Latest loan statements
- Contents insurance schedule

- Legal financial agreements

- Any other appropriate documents to support your application

ALL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED

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 both parents / applicants (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:

Father / Stepfather _____ Date _____

Mother / Stepmother _____ Date _____

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

Divorced / separated / widowed

Other (state reason)

Please return this form and all documents to:

The Bursary, The School of St Helen & St Katharine, Faringdon Road, Abingdon, Oxfordshire, OX14 1BE

Telephone 01235 520657 or email dshenton@shsk.org.uk for all queries

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. PARENTS / 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 the Application Form

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 in to 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 schools fees will not be taken in to 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) Only complete this if repayment is effected by a full Endowment Policy
- j) Bank overdraft and other loan charges (please state the purpose of the loan)

5. PARENTS' / APPLICANTS' CAPITAL ASSETS

The following will be taken in to 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. PARENTS' / 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
 - (iv) If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year
 - (v) If the child is in receipt of financial assistance from any other family members or income from a Trust Deed please declare the annual amount available
- i) 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***