

## **1, Child**

1.a. Full name

1.b. Date of birth

1.c. Date of entry

## **2. Parent details (complete for both father and mother separately)**

2.a. Names

2.b. Title

2.c. Address

2.d. Post code

2.e. Day phone

2.f. Evening phone

2.g. Mobile

2.h. Email

## **3. Parent's Occupations**

3.a. Employer's name, address & phone number

3.b. Self employed (business?) Are you shareholder or director or proprietor of 3a or 3b?

If yes, proportion of business by you and spouse/ partner

3.c. Unemployed?

3.d. Fully or semi retired?

## **4. Income**

*Enter current earnings and all expected income for last full tax year*

- 4.a Gross salary and other emoluments
- 4.b Taxable profits for last two accounting periods
- 4.c. Gross pension, widows pension, state pension p.a.
- 4.d Gross investment income from
  - \* fixed interest
  - \* dividends & other funds
- 4.e Gross rental income
- 4.f Social security benefits
- 4.g Separation or maintenance allowance
- 4.h Is there a Court Order or Separation Agreement? Please state annual amount for school fees.
- 4.i Benefits in kind not already quoted previously.
- 4.j Any other income or gains not stated
- 4.k Please provide copy of your self assessment tax calculation last year.

## **5. Outgoings**

- 5. a Tax payable on incomes declared above.
- 5. b National Insurance Contributions.
- 5. c Pension contributions
- 5. d mortgage repayments including capital and interest.
- 5. e Endowment mortgage premiums
- 5. f Any other interest e.g credit cards, loans
- 5. g Annual landlord rent payable on principal residence

## **6. Capital assets**

6. a Approximate market value of all investments

- Banks / building society / N Sand I Savings accounts
- Equities
- PEPs, ISAs, TESSAs, TOISAs
- Life policies and bonds

6. b Approx market value of principal residence

6. c Approx market value of other possessions incl house contents, car, paintings, collections, jewellery etc.

6. d Cash at banks or elsewhere

6. e Approximate market value of any other assets

6. f Net Worth / value of any businesses owned or shared

6. g Approx market value of interest in any other property, land or buildings

6. h Redundancy or any other termination payments

6. i Monies owed to you

6. j Other asset s not listed

## **7. Capital Liabilities**

7. a Mortgage details – amount outstanding – final payment date

7. b Other liabilities (specify)

## **8. Net Assets**

8. a Total Assets

8. b Liabilities

8 .c Net Assets

Please explain any reasons why net assets cannot be used to pay school fees

**9. Dependent Children (specify child to which this application refers and list all children separately)**

9. a Forename

9. b Date of birth

9. c School

9. d Boarding or day

9. e Annual school fees

9. f Compulsory additional school charges

9. g Amount of fees in £ covered by

- Scholarships, bursaries
- Annual sum from capital repayment schemes
- Armed Forces / Diplomatic / Company Education allowances
- Assistance from any other sources eg grandparents, trusts

9. h Annual income of child

**10. Verification of income**

1. P60 and P11D + copy of HMRC tax calculation
2. End of tax year pay advice]
3. Report and accounts of own company
4. Others

**11. Verification of Assets**

1. Property valuation
2. Investment portfolio valuation
3. Mortgage statement
4. Contents insurance

**HOME VISIT**

**The school may wish to visit you at home to discuss your application. Please indicate your agreement.**

## DECLARATION

We / I have made a complete and accurate declaration of our / my income and assets

We / I understand that if we / I are / am offered a school Bursary for our / my child, the following terms and conditions apply as between ourselves / myself and the School

1. The child's fees account with the School will be credited termly with the amount of the Bursary for so long as the award remains in effect;
2. Any award of Bursary is subject to annual review and we/ I must complete an annual declaration of our / my financial circumstances on the form provided by the School and supply all supporting evidence by the return date indicated
3. We / I will report immediately any material change in the financial position declared
4. The Bursary may be withdrawn or reduced if:
  1. We / I act or our/my child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our/my child at the school;
  2. We / I have failed to return the annual declaration of our/ my financial circumstances by the return date indicated;
  3. We / I have failed to produce any additional information required by the School to evidence our / my financial circumstances;
  4. In the opinion of the Head, our / my child's attendance, progress or behaviour no longer merits the continuation of the award
  5. We / I are more than 28 days in arrears in respect of any amount due and owing to the School
  6. There is a material change in our/my financial circumstances;
  7. The School's resources are insufficient to maintain the level of the award
5. The Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our / my child's fees account will be become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary.

Signed

Date