

Prospective Parents' Summary Financial Information

Anticipated year of entry :

CONFIDENTIAL WHEN COMPLETED

2021

Please complete all boxes, and enter values in £ for the whole family. Please add additional notes where necessary.

Boy Name and Surname: *John Adam Smith* Age: *11*

Will your son be a Boarder, a Day Boy, or is this Not Known? *Boarder*

Family Parent / Carer 1: NAME *Ms. Clare Smith* OCCUPATION *Teacher*

Parent / Carer 2: NAME OCCUPATION

How many brothers or sisters does your son have (aged 18 or under), and what are their ages? *A sister aged 8*

Notes Is there anything that the School should be aware of regarding your family's situation (such as a bereavement or divorce)? *I am a single mother. John's father has no contact with him*

Income Please enter the **total annual household income** anticipated for the current year. Please include all salaries, benefits, pensions, interest payments, dividends, and maintenance payments. *£54,000*

NOTES ON INCOME *Income includes my salary, child benefit, rental income and maintenance payments from John's father*

Charges Please enter the **total household fixed charges** on income anticipated for the current year. Please include income tax, national insurance contributions, pension contributions, interest payments, mortgage or rent payments, and maintenance payments, **but do not include living expenses or school fees.** *£23,880*

NOTES ON CHARGES *Charges include tax (£5,300), National Insurance (£3,580) and rent (£1,250 per month)*

Assets Please enter the value of **total household assets**. Please include all properties, significant assets, business assets, investments, trust funds, and cash / deposits. Value of Properties *£ 250,000*
Value of Other Assets *£ 12,500*

NOTES ON ASSETS *The property is a small flat in Cornwall that I rent out. I also have a car and some investments*

Liabilities Please enter the value of **total household liabilities**. Please include mortgages on properties, bank overdrafts, hire purchase agreements, and other debts. Mortgage Value *£ 0*
Value of Other Debts *£ 3,500*

NOTES ON LIABILITIES *I have a credit card debt of £3,500. My flat has no mortgage*

DECLARATION. I/we have made a complete statement of my/our financial situation and circumstances generally. I/we undertake to provide to the School, on request, any documentary evidence of the information provided above.

Signature of Parent / Carer 1 *Claire P S Smith* Date *01/03/19*

Signature of Parent / Carer 2 Date

Please provide any further details you believe would be helpful in the box below. This may include further details on income, charges, assets and liabilities, or further information on your son's circumstances or family background. This information will be treated in strict confidence.

John's father and I separated when John was young. He works as a taxi driver and pays maintenance (£300 each month) as agreed with the Court.

The flat in Cornwall used to be my mother's; she sadly died three years ago, and I now rent it out to supplement my income. I rent a small house for the children and me close to their current school.

Parents seeking financial assistance are asked to complete this form and submit it to the School. This information will be held securely, and kept confidential, by the School, and will be used only to assess the level of financial support required. Personal information supplied to the School on this form will not be disclosed to any third party except to help prevent fraud or if the School is required to do so by law.

Once completed, this form should be sent to: The Bursar, Tonbridge School, Tonbridge, Kent, TN9 1JP, or e-mailed to the Bursar's Personal Assistant, Donna Shepherd, at djs@tonbridge-school.org. Any questions should be e-mailed to Donna Shepherd.