



Confidential Statement of Financial Circumstances
in Support of an Application for a Bursary
For the Academic Year 2021-2022

Please read the Guidance Notes on pages 7 and 8 before completing this questionnaire

1. Child

Form with three rows for child information: a) Full Names, b) Date of birth, c) Term/year for entry or date of joining

2. Parents (See Note 2)

PARENT 1

PARENT 2

Table with columns for Parent 1 and Parent 2, and rows for: a) Name, b) Address, c) Occupation, d) Employment status, e) Employer name, f) Shareholding % of business, g) Are you a company director?, h) Email, i) Phone numbers (Daytime/Evening), k) Mobile

3. Income	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
a) Gross salary	3(a)			
b) Business profits or self employed earnings	3(b)			
c) Gross pensions				
d) Gross investment income	3(c)			
e) Gross rents received	3(d)			
- Mortgage payments				
- Agents fees				
- Other expenses on rental property				
f) Benefits received	3(e)			
g) Maintenance received	3(f)			
h) School fees received under court order/separation agreement	3(g)			
i) Family support				
j) Any other income (explain in space below Total Income)				
<b>TOTAL INCOME</b>				

4. Outgoings	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
<b>Taxes and Insurance</b>				
a) PAYE on incomes shown in Section 3	4(a)			
b) NI contributions				
c) Tax on dividends received				
d) Pension contributions	4(b)			
e) Life insurance premium				
f) Private medical insurance premium				
<b>Property Expenses</b>				
a) Mortgage payments on main residence	4(c)			
b) Rent – main residence				
c) Household insurances				
d) Council tax				
e) Utilities				
<b>Household Costs</b>				
a) Food				
b) Clothing				
c) Landlines/broadband/TV				
d) Mobiles				
e) Medical expenses				
f) Public transportation				

Vehicle Expenses	(See Note)	PARENT 1 £ ANNUAL	PARENT 2 £ ANNUAL	COMBINED £ ANNUAL
a) Car finance	4(d)			
b) Fuel				
c) Insurance				
d) Maintenance/Repairs				

#### Education Expenses

a) Other school fees				
b) Tutors/lessons				
c) Clubs				
d) Childcare				

#### Other Expenses

a) Maintenance paid	4(e)			
b) Loan repayments	4(f)			
c) Long term credit card debt repayments	4(g)			
<b>TOTAL EXPENSES</b>				

### 5. Capital assets

(See Note)

PARENT 1 £

PARENT 2 £

COMBINED £

#### Approximate market value

a) i) Bank / building society balances	5(a)			
ii) ISA & other investments	5(a)			
b) Value of main residence	5(b)			
c) Value of other properties	5(c)			
d) Value of vehicles	5(d)			
e) Net worth of business	5(e)			
f) Redundancy settlements due				
g) Pension schemes				
h) Insurance settlements due				
<b>TOTAL ASSETS</b>				

## 6. Capital liabilities

(See Note)

		PARENT 1 £	PARENT 2 £	COMBINED £
a) Mortgage amount outstanding on principal residence	6(a)			
b) Mortgage outstanding on other properties	6(a)			
c) i) loans	6(a)			
ii) credit cards	6(a)			
iii) finance leases	6(a)			
<b>TOTAL LIABILITIES</b>				

## 7. Dependent children

(See Note)

		APPLICANT	CHILD 2	CHILD 3	CHILD 4
a) Forename					
b) Date of birth					
c) Current school					
d) Boarding or day					
e) Annual fees	7(a)	NA			
f) Compulsory extras					
g) Uniforms					
<b>SUB TOTAL (a-g)</b>					
h) Amount of School scholarships / bursaries / discounts	7(a)				
i) Family support					
j) Other support					
<b>SUB TOTAL (h-j)</b>					
<b>TOTAL (a-g) LESS (h-j)</b>					

## 8. Other relevant information

(Please use this space to tell us anything you feel we ought to know in reviewing this application)

## 9. Free school meals/pupil premium

Does your daughter currently qualify for free school meals or pupil premium?

Please tick as applicable

YES

If you have ticked "Yes" you must supply evidence of your daughter's qualification for free school meals or pupil premium (as appropriate) in addition to the documents described in Section 10 below.

NO

## 10. Documents to be supplied

Please provide documentary evidence of the figures provided in this application. **You MUST include ALL bank statements for each parent for the last three months.** In addition, please ensure the School is provided with the items on the checklist below by email or post.

Last 3 payslips for **each** working parent

Last P60 for **each** working parent

Last 3 months bank statements for **each** parent

Latest audited accounts (if own a business)

Latest PAYE self-assessment (if own a business)

Proof of house valuation (may include internet valuation)

Letters confirming amount of government benefits

Latest mortgage statement

Latest loan statement

## DECLARATION

After having read the attached notes, **please type the name of each parent in the boxes below** (please see below for exceptions). By typing the names of each parent in the box provided, you are confirming the following:

We/I have read the guidance notes and have made a complete declaration of our/my income and assets and consent to this form and all information supplied with it being shared with Bursary Administration Limited.

We/I understand that if our/my child is offered a bursary and we/I accept a place for her at LEH, the following terms and conditions will apply:

- a) Our/my child's fees account with the school will be credited termly with the amount of the bursary;
- 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 LEH 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 bursary 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 stated in the Parent Contract including, without limitation, we/I fail to pay any amounts owed to the School that are not covered by the bursary when such amounts fall due;
  - 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) in the opinion the Head, our/my child's attendance, academic performance or behaviour no longer merits continuation of the bursary;
  - vi) there is a material improvement in our/my financial circumstances; and
  - vii) the School's resources are insufficient to maintain the level of the bursary.

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

Divorced  Separated  Widowed  Other  (state reason)

### Signatures:

Parent 1

Date

Parent 2

Date

Please return your completed form by email to: [registrar@lehs.org.uk](mailto:registrar@lehs.org.uk)

We strongly recommend that all supporting documents be sent electronically.

Where this is not possible, please post your documents to:

The Registrar  
Lady Eleanor Holles School  
Hanworth Road  
Hampton TW12 3HF

## GUIDANCE NOTES

Please read these carefully before completing the Application Form. If you need further help, please contact the LEH Finance Office.

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

- Include the gross annual amount of income **FROM ANY SOURCE** for the current or latest financial year
- Profits from a business or profession means 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.
- All investment income, including building society interest, should be shown gross.
- Any rental income from letting or sub-letting of property should be shown gross, with associated expenses shown separately.
- Please list on a separate sheet if necessary ALL social security benefits, naming their type and how long each have been received for.
- 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.
- 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.

### 4. OUTGOINGS

- Enter income tax and tax on unearned income **TOGETHER**.
- Enter payments to pension schemes.
- Enter principal as well as interest payment on a mortgage for the main residence.
- Include amount of car loan/hire purchase/lease payments.
- Include all spousal maintenance and child support payments.
- Include principal as well as interest payments on personal loans.
- Include only repayment of credit card balances more than 12 months old.

## **5. PARENTS' / APPLICANTS' CAPITAL ASSETS**

The following will be taken in to account:

- a) Monies held on deposit at any bank or building society and 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).
- e) 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 in Section 8 or 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.

- a) Please refer to the current academic year

## **8. ANY OTHER RELEVANT INFORMATION**

Please enter in the space provided or on another sheet, if necessary, any details which you feel we should know in reviewing this application including, for example, a significant change in income or outgoings for the coming year.

## **9. DATA PROTECTION**

Information supplied in and with this form will be held securely and only used by the School to administer and assess your bursary application. For more details about how the School uses personal data, please see our Privacy Notice available on the website [here](#).

We will share this form and all information supplied in and with it with Bursary Administration Limited who has been appointed by LEH to assist with our bursary application assessment process. Details regarding how they will handle your data can be located [here](#).

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