



CONFIDENTIAL

**Statement of Financial Circumstances
in support of an application for a Bursary or Scholarship Supplement**

Please read the Notes for Guidance on pages 7-9 before completing this form
Please return the completed form to the Bursar (w.ethelston@dauntseys.wilts.sch.uk)

1. CHILD

- (a) Full Name
- (b) Date of Birth

2. PARENTS

	<i>Father/Step-father</i>	<i>Mother/Step-mother</i>
(a) Name
(b) Title
(c) Address(es)
(d) Tel No(s)
(e) Occupation
(f) Retired - Employed - Self-Employed - Unemployed (circle which applies)		
(g) Type of business

Father/Step-father

Mother/Step-mother

4. EXPENDITURE

(a)	Tax payable on Incomes declared above <i>(including tax deducted at source)</i>	.....	.....
(b)	National Insurance & other contributions	.....	.....
(c)	Mortgage/rent	.....	.....
(d)	Council Tax	.....	.....
(e)	Water Rates	.....	.....
(f)	Electricity	.....	.....
(g)	Gas/Oil	.....	.....
(h)	Telephone/Mobile Phone	.....	.....
(i)	Food/Household expenditure	.....	.....
(j)	House Insurance	.....	.....
(k)	Private pension contributions, savings etc	.....	.....
(l)	Car:- fuel, tax, insurance, service/repairs	.....	.....
(m)	Clothes	.....	.....
(n)	Gifts	.....	.....
(o)	Holidays	.....	.....
(p)	Loans/Credit Cards	.....	.....
(q)	School Fees	.....	.....
(r)	Any other expenditure	.....	.....

Total Expenditure _____

Total Income less Total Expenditure _____

7. DEPENDENT CHILDREN

Include the child to whom this application refers: if more than 4 children, give details on a separate sheet

	1	2	3	4
(a) Forename
(b) Date of birth
(c) School or College
(d) Boarding or Day

8. OTHER DEPENDENTS

.....

9. VERIFICATION OF INCOME

Please enclose documentary evidence in support of the income figures in Section 3.
 Please tick those you are enclosing:

- P60 Copy of HMRC tax calculation issued under Self Assessment
- Pay Slip Confirmation of Schedule D self employment income from an independent accountant
- Report & Accounts (including Balance Sheet) for the years
- Others

VERIFICATION OF ASSETS

Please enclose documentary evidence of capital assets and tick those you are enclosing:

- Property Valuation Investment Portfolio Valuation
- Mortgage Statement Other

10. DECLARATION

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

We/I understand that if we/I are/am offered a Bursary or Scholarship Supplement for our/my child and accept a place for him/her at the School, the following terms and conditions will apply as between ourselves/myself and the School:-

- a) our/my child's fees account with the School will be credited termly with the amount of the Bursary or Scholarship Supplement for so long as the award remains in effect;
- b) any award of a Bursary or Scholarship Supplement is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant evidence by the return date indicated;
- c) we/I will report immediately any material change in the financial position declared;
- d) the Bursary or Scholarship Supplement may be withdrawn or reduced if:
 - i) 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;
 - ii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iii) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
 - iv) in the opinion of the Head, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;
 - v) we/I are more than 28 days in arrears in respect of any amount due and owing to the School;
 - vi) there is a material change in our/my financial circumstances;
 - vii) the School's resources are insufficient to maintain the level of award.
- e) the Grant will be withdrawn and the value of any amount of the Grant previously credited against our/my child's fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Grant.

Signatures: *(to be signed by both parents/applicants)*

Parent/Guardian Date

Parent/Guardian Date

NOTES FOR GUIDANCE FOR COMPLETION OF DECLARATION FORM

Before completing the form, please read these notes carefully. These notes refer to the corresponding paragraph on the form.

The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling. References to Her Majesty's Customs & Excise (HMRC) include the relevant national Taxation Authority.

2. PARENTS/APPLICANTS

These are defined as:

- ~ the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- ~ the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- ~ the child's guardian appointed in accordance with Section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- ~ the person with whom the child resides in accordance with either:
 - i) a subsisting residence order made under Section 8 of the Children Act 1989; or
 - ii) any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
- ~ where a pupil either has no parents as defined above or the School is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of Section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- ~ where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- ~ If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete the Application Form.

3. INCOME

- a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) - at the amount agreed for taxable purposes.
- b) Profits from a business or profession - at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.
- d) All other Investment income (eg interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.
- e) Enter income for letting or subletting of property at the amount of the NET profit agreed with HMRC.
- f) All social security benefits received should be declared and type of benefit specified.

- g) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees - where a parent is required by a Court Order, or a legal binding separation agreement (eg Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.
- h) Members of HM forces and Diplomatic Service should include the amount of any Education Allowance which they received. Parents in other occupations should include any similar sum.
- i) Insurance Policies for School Fees - if any insurance policy for the payment of School Fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant.
- j) Where a trust has been established in favour of the child for whom you are applying, details of the annual amount available should be given.
- k) Other Income - include free benefits in kind agreed by HMRC as not subject to tax, eg representative occupation of house, free meals etc.
Also include any unearned income received by the child eg interest from National Savings, bank or building society deposits, share dividends etc.

5. CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:-

- ~ The capital sum of any monies on deposit with any bank, deposit taker or building society.
- ~ Investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- ~ The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.
- ~ If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- ~ In the case of second homes and/or other properties, these should also be included at their estimated current market value.

6. CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

7. DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying. Enter in the columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

8. OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with your or dependent upon you, please provide details including age, address, condition, etc.