BRIGHT FUTURES
St Catherine's School

**CONFIDENTIAL**

**APPENDIX A**

St Catherine's BRAMLEY

**St Catherine's School, Bramley**

Confidential Statement of Financial Circumstances

**in support of an application for Bursary or Fees Assistance**

**Please return completed form and supporting documentation to diane.haeffele@stcatherines.info**

You must read the *Notes for Guidance* on pages 6 and 7 before completing this questionnaire

| | | | | | | |
|---|---|---|---|---|---|---|
| **1.** | **CHILD** | | | | | |
| | (a) | Full Names | | | | |
| | (b) | Date of Birth | | (c) Year of Entry (if not yet enrolled) | | |
| | (d) | If current pupil | Current Year | House | | |
| | (e) | If new pupil, place applied for? | | Day Boarding (circle which applies) | | |
| **2.** | **PARENTS** (See Note 2) | | | | | |
| | | | **Parent/Guardian 1** | | **Parent/Guardian 2** | |
| | (a) | Names | | | | |
| | (c) | Address(es) | | | If different | |
| | (d) | Occupation Status | R – E – SE - N | | R – E – SE - N | |
| | | R (Retired), E (Employed), SE (Self Employed), or N (Not employed) circle which applies above | | | | |
| | (e) | Occupation Title | | | | |
| | (f) | Name & address of Employer or Business | | | | |
| | (g) | Are you a Director or Proprietor of this Company or Business? | YES | NO | YES | NO |
| | | If "YES" state proportion of Company or Business you and/or your spouse/partner own | % | | % | |
| | (h) | Daytime Tel No | | | | |
| | | Evening Tel No | | | | |
| | | Mobile Tel No | | | | |
| | | E-mail address | | | | |
| **3.** | **ANNUAL INCOME** (See Note 3) | | | | | |
| | *(Please enter below your current annual earnings and expected annual income from all sources)* | | | | | |
| | | | ***Parent/Guardian 1*** | | ***Parent/Guardian 2*** | |
| | (a) | Gross Salary and other similar earnings (including all taxable benefits & emoluments) | | | | |
| | (b) | Profits of business | | | | |
| | (c) | Gross pension | | | | |
| | (d) | Gross investment income from Building Societies/Banks/Shares/etc: | | | | |
| | (e) | Net income from property before Tax | | | | |
| | (f) | Social Security benefits (including Child Allowance) | | | | |
| | (g) | Is there a Court Order/Separation Agreement? | YES / NO | | YES / NO | |

| | | | | |
|---|---|---|---|---|
| | (h) | Separation or Maintenance Allowance Received for School Fees | | |
| | (i) | Other Separation or Maintenance Allowance Received | | |
| | (j) | Benefits in Kind provided free by reason of employment | | |
| | (k) | Any other income not included in (a) to (i) above (please detail here) | | |
| **4.** | **ANNUAL OUTGOINGS** (See Note 4) | | | |
| | | | ***Parent/Guardian 1*** | ***Parent/Guardian 2*** |
| | (a) | Tax payable on Earned Income (including tax deducted at source) | £ | £ |
| | (b) | Tax payable on Unearned Income | | |
| | (c) | National Insurance Contributions | | |
| | (d) | Superannuation contributions | | |
| | (e) | Annual Mortgage Payment for principal residence | | |
| | | (i)Annual Interest Element of Mortgage Payment for principal residence | | |
| | (f) | Council Tax | | |
| | (g) | Annual landlord rent payable on principal residence | | |
| | (h) | Separation or Maintenance Allowance Payable | | |
| **5.** | **CAPITAL ASSETS** (See Note 5) | | | |
| | | | ***Parent/Guardian 1*** | ***Parent/Guardian 2*** |
| | (a) | Approximate market value of all investments | £ | £ |
| | | i) Building Society/Bank deposits | | |
| | | ii) Equity investments, stocks, other financial instrument | | |
| | | iii) PEPs, ISAs, TESSAs | | |
| | (b) | Approximate market value of principal residence (freehold or leasehold) | | |
| | (c) | Approximate market value of other possessions including house contents, car, etc | | |
| | (d) | Cash at banks or elsewhere | | |
| | (e) | Approximate market value of any other assets (please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years) | | |
| | (f) | Net worth/value of any businesses which you own or share | | |
| | (g) | Approximate market value of any other properties owned either at home or abroad | | |
| | (h) | Redundancy, employment separation or lump sum payments received | | |
| **6.** | **CAPITAL LIABILITIES** (See Note 6) | | | |
| | *(Please give details of any capital charges against the assets declared in Section 5)* | | | |
| | | | ***Parent/Guardian 1*** | ***Parent/Guardian 2*** |
| | (a) | Mortgage — Amount outstanding on house | £ | £ |
| | | Final payment date | | |
| | (b) | Other liabilities (*please specify)* | | |
| **SUB-TOTAL** | | **ASSETS (5)** | | |
| | | **LIABILITIES (6)** | | |
| | | **NET ASSETS (5-6)** | | |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **You should fully explain here if there are any reasons why net assets cannot be converted or utilised to pay school fees or to fund fees.** | | | | | | | |
| **7.** | **DEPENDENT CHILDREN** (See Note 7) | | | | | | |
| | *(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 or State | | | | | |
| | (e) | Annual school or other educational fees (excluding extras & sundry disbursements) | | | | | |
| | (f) | **Compulsory** additional school charges | | | | | |
| | (g) | Amount of fees shown in (e) covered by: | | | | | |
| | | i) | Services/Diplomatic/ Company Education Allowances (gross) (state whether sum has been included in gross salary at 3 (a)) | | | | |
| | | ii) | Annual sum arising from Educational Insurance Policies | | | | |
| | | iii) | Assistance from any other sources e.g. Grandparents, trusts, charities, etc (please specify) See notes | | | | |
| | (h) | i) | Annual income of child *(if any)* | | | | |
| | | ii) | Capital Value of Trust | | | | |
| **8.** | **OTHER DEPENDENTS** (See Note 8) *(Please give details)* | | | | | | |
| | | | | | | | |
| **9.** | **ANY OTHER RELEVANT INFORMATION** (See Note 9) *For more room use page 8* | | | | | | |
| | | | | | | | |

| | | |
|---|---|---|
| **10.** | **MONTHLY HOUSEHOLD INCOME AND EXPENDITURE** | |
| | **MONTHLY INCOME:** | **£** |
| | **MONTHLY EXPENDITURE:** | **£** |
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| **TOTAL EXPENDITURE** | | **£** |

| 11. | VERIFICATION OF INCOME/OUTGOINGS/ASSETS<br>You must supply documentary evidence in support of the income and outgoings figures in Section 3, 4 and 5 as appropriate to the sections that you have completed. | | ENCLOSED (please tick) |
|---|---|---|---|
| | 3.a | P60 and last 3 salary advices **OR**<br>Copy of HMRC tax calculation issued under Self Assessment **OR**<br>Confirmation of Schedule D self employment income from an independent accountant | |
| | 3.b | Audited Accounts | |
| | 3.c | Pension Advice | |
| | 3.d | Investment Statements | |
| | 3.e | HMRC Tax Return | |
| | 3.f | Benefit Statements | |
| | 3.g | Separation or Court Order | |
| | 4.e | Annual Mortgage Statement | |
| | 4.g | Rental Agreement | |
| | 5.b | Estate Agent or Internet Valuation | |
| | 5.d | Bank and/or Building Society Statements for the last three months | |

## 12. DECLARATION

Having read the attached notes, the following declaration should be signed by both parents/applicants:

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 Grant for our/my child and accept a place for 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 Grant for so long as the award remains in effect;

b) any award of a Grant 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 supporting evidence by the return date indicated;

c) we/I will report immediately any material change in the financial position declared;

d) the Grant may be withdrawn or reduced if:

   i) we/I act or our/my child acts in breach of the School's Terms and Conditions for our/my child at the school;
   ii) we/I have failed to return the annual declaration of our/my financial circumstances by 20th February;
   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:

Parent/Guardian 1 …….. Date ……

Parent/Guardian 2 …….. Date ……

**St Catherine's stores and holds personal and contact information with respect to the privacy of individuals. Our public policies contain all information regarding our compliance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018 (DPA 2018) www.stcatherines.info/school-policies**

## ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a Grant from the school are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result.

……

……

**NOTES FOR GUIDANCE FOR COMPLETION OF GRANT APPLICATION FORM**

Before completing the form, please read these notes carefully, and contact the Chief Operating Officer PA diane.haeffele@stcatherines.info if further information or advice is required. 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 Revenue & Customs (HMRC) include the relevant national Taxation Authority.

**2. PARENTS/APPLICANTS**

These are defined as:

- The parents of the child where they live together (whether or not they are married to each other or in a Civil Partnership) 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 she 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 parents will be required to complete and sign the Application Form together or separately.

**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 (e.g. interest or National Savings & Investment 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 from letting or sub-letting 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/guardian is required by a Court Order, or a legal binding separation agreement (e.g., Deed of Separation) to pay part of the School fees, then this must be declared. 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.

j) Include free benefits in kind agreed by HMRC as not subject to tax, e.g., representative occupation of house, free meals.

**4. ANNUAL OUTGOINGS**

a) Enter Income Tax and tax on unearned income SEPARATELY.

Note. Any other outgoings for example, second residence must be included on a separate piece of paper.

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

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

a) 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.

b) The current market value of your principal residence. The current market value should be estimated where a current valuation is unavailable.

f) 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.

g) In the case of second homes and / or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage unless there are special reasons which should be declared.

**6. PARENTS'/APPLICANTS' 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 at their current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

e) The figures to be inserted here refer to the current academic year.

g) ii) Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum.

iii) 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. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

iv) Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given. You must also disclose details of any discretionary trust of which the child is a beneficiary, whether named specifically or as a class member, or even where the trustees have power to add the child as a beneficiary.

h) Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

**8. OTHER DEPENDENTS**

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

**9. ANY OTHER RELEVANT INFORMATION**

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant, e.g. a notable change in income or outgoings for the coming year. Please also include significant discretionary spending (holidays, club memberships etc.) in Section 10.

**PAGE LEFT BLANK FOR ANY ADDITIONAL INFORMATION**