



CONFIDENTIAL WHEN COMPLETED

St Peter's School

Application for a Bursary Grant

ALL SECTIONS MUST BE THOROUGHLY COMPLETED

THE BURSARY COMMITTEE WILL ONLY CONSIDER FULLY COMPLETED APPLICATION FORMS SUBMITTED WITH SUPPORTING DOCUMENTATION, INCOMPLETE FORMS WILL BE RETURNED TO YOU WHICH MAY DELAY THE APPLICATION PROCESS.

What Information will I have to provide?

You will need to provide details in relation to all of your circumstances and that of any partner living with you, whether or not that partner is a parent of the child. This is because the committee assesses the circumstances of the family unit your child lives in.

1. CHILD/CHILDREN

| | | | |
|-----------|--|------------|---------------|
| Full Name | | Year Group | Date of Birth |
| Full Name | | Year Group | Date of Birth |
| Full Name | | Year Group | Date of Birth |

2. CONTACT DETAILS

| | | |
|----------------|-----------------|-----------------|
| | Parent 1 | Parent 2 |
| Names | | |
| Title | | |
| Marital Status | | |
| Address | | |
| Postcode | | |
| Daytime Tel | | |
| Evening Tel | | |
| Mobile | | |
| E Mail Address | | |

3. TYPE(S) OF FINANCIAL ASSISTANCE REQUESTED (please delete as applicable)

| | | |
|---|--------|---|
| Bursary | yes/no | The bursary scheme takes the form of a means-tested financial discount. It is dependent on evidenced household income, savings, assets and investments. Bursary applications cannot be assessed without full disclosure of your financial situation and may require a home visit from our third party agents. |
| Temporary Fee Deferment (Current parents only) | yes/no | This may allow you to defer payment of fees in circumstances of financial difficulty by way of a payment holiday This depends on your expected net income and outgoings for the next 3 months and your ability to meet the payment of fees in the medium-term. Payments will be collected by direct debit in the usual manner once deferment is agreed. Please provide a covering letter outlining the reasons for the temporary difficulties. |

4. OCCUPATION

| | Parent 1 | Parent 2 |
|--|----------|----------|
| Occupation | | |
| Employer's Name and Address | | |
| Self-employed Name of Business and address If you a Director or Shareholder or Proprietor of this Company or Business, please state what proportion of Company/Business you own. | | |
| Unemployed | yes/no | Retired |
| | yes/no | Other |

5 INCOME

| | Parent 1 | Parent 2 | Office Use Only |
|--|----------|----------|-----------------|
| INCOME - EMPLOYED | | | |
| Gross Monthly Salary (incl. commission, bonus, overtime) | | | |
| Net Monthly Salary (i.e. take home pay) (after deduction of PAYE, NI, pension etc.) | | | |
| Benefits in Kind (P11D) | | | |
| INCOME – SELF EMPLOYED | | | |
| Gross income before Tax (i.e. after expenses) per annum | | | |
| INCOME – COMPANY OWNERSHIP | | | |

| | | | |
|---|---|---|--|
| Dividends expected this year | | | |
| OTHER – RENTAL INCOME, BENEFITS AND TAX ALLOWANCES ETC | | | |
| Student Maintenance Loans | | | |
| Rental Income from other property | | | |
| Maintenance/CSA from ex-partner | | | |
| Court Order/Separation Agreement) | | | |
| Child Benefit | | | |
| Child Tax Credit | | | |
| Working Tax Credit | | | |
| Universal Credit | | | |
| Carer's Allowance | | | |
| Disability Allowance | | | |
| Job Seeker's Allowance | | | |
| Pension Payments | | | |
| Any other income/gains (e.g. Trust income) | | | |
| TOTAL EXPECTED MONTHLY INCOME | £ | £ | |

* please ensure you include all income from any source, even if it is not listed in the categories above.

| 6. OUTGOINGS EXCLUDING SCHOOL FEES (based on expected monthly outgoings for next 3 months) | | | |
|---|---|-------------------------------------|-----------------|
| | | Monthly outgoing (or equivalent) | Office Use Only |
| MORTGAGE/RENT | Your Residential Home | | |
| | Other Property 1 (if applicable) | | |
| | Other Property 2 (if applicable) | | |
| CREDIT COMMITMENTS See also 13 below | Loans | | |
| | Credit Cards | | |
| | Car Finance | | |
| | Other (please specify) | | |
| UTILITIES | Gas | | |
| | Electricity | | |
| | Water | | |
| INSURANCE | House Insurance | | |
| | Car Insurance | | |
| | Other (please specify) | | |
| TRANSPORT/TRAVEL | Fuel | | |
| | Road Tax/Vehicle Excise Duty (per month) | | |
| | Public Transport | | |
| | Other (please specify) | | |
| COST OF LIVING | Council Tax | | |
| | Housekeeping | | |
| | Clothing | | |

| | | | |
|--|---|---|--|
| | Car maintenance/servicing | | |
| | Food | | |
| | Going Out/Entertainment | | |
| | Broadband | | |
| | Television Licence | | |
| | Television Packages (Sky/Netflix etc.) | | |
| | Mobile Phones | | |
| | Landline Phones (if not part of Broadband) | | |
| | Hobbies/Leisure/Sport/Gym | | |
| | Pets | | |
| | Other (please specify) | | |
| MISCELLANEOUS | Childcare (excluding school / nursery fees) | | |
| | Maintenance/CSA | | |
| | Pension Contributions (AVCs) | | |
| | Charitable donations | | |
| | Priority debts (if applicable) | | |
| | Other (please specify) | | |
| | Other (please specify) | | |
| TOTAL EXPECTED MONTHLY OUTGOINGS (EXCLUDING SCHOOL FEES) | | £ | |

| | | | |
|----------------|--|--|--|
| 7. OWN COMPANY | | | |
|----------------|--|--|--|

| | Parent 1 | Parent 2 | Office Use Only |
|---|----------|----------|-----------------|
| Expected Net Retained Profit/loss for year (after taxation and dividend payments, as per company accounts) | | | |

8. PROPERTIES

i) Your Residential Home:

| | |
|---|--|
| Market Value: | |
| Mortgage Outstanding: | |
| Net Value: | |
| Monthly Mortgage Payment: | |
| Capital Repayment or Interest Only, with rate and details of any fixed term | |

Other Properties, Land and Buildings Owned by You**ii) Other Property 1:****Address:**

| | |
|--|--|
| Market Value: | |
| Mortgage Outstanding: | |
| Net Value: | |
| Monthly Mortgage Payment: | |
| Capital Repayment or Interest Only, with rate and details of any fixed term | |
| Monthly Rental Income: | |

iii) Other Property 3:**Address:**

| | |
|--|--|
| Market Value: | |
| Mortgage: | |
| Net Value: | |
| Monthly Mortgage Payment: | |
| Capital Repayment or Interest Only, with rate and details of any fixed term | |
| Monthly Rental Income: | |

* please use additional sheets for any further properties, land and buildings owned by you.

Please state whether you have considered re-mortgaging/selling/downsizing your home/properties to contribute towards school fees, and if not, the reason why. Include information about capital repayment mortgages if applicable.

9. CASH, SAVINGS and INVESTMENTS

(e.g. savings accounts, investments, shares, bonds, trusts, national savings certificates etc)

i) Cash/Saving/Investments

| | |
|---|-----------------------------|
| Type of Savings: | |
| Company: | Current Balance/Valuation : |
| <p>Please state whether you have considered utilising savings to contribute towards school fees: Please note the Bursary Committee has indicated that savings should be utilised to prioritise the payment of school fees; applicants should consider whether other sources of finance are available for non-school fees, e.g. low interest rate student loans to fund university fees.</p> | |

ii) Cash/Saving/Investments

| | |
|---|--------------------|
| Type of Savings: | |
| Company: | Balance/Valuation: |
| <p>Please state whether you have considered utilising savings to contribute towards school fees: Please note the Bursary Committee has indicated that savings should be utilised to prioritise the payment of school fees; applicants should consider whether other sources of finance are available for non-school fees, e.g. low interest rate student loans to fund university fees.</p> | |

* please use additional sheets for any further savings/investments owned by you.

10. VEHICLES

| Make | Model | Registration | Value £ | Loan/Lease/Owned |
|------|-------|--------------|---------|------------------|
| | | | | |
| | | | | |

11. OTHER SIGNIFICANT ASSETS (e.g. jewellery, paintings, cars, motorcycles, bicycles, collectables)

| Item | Value £ |
|------|---------|
| | |
| | |
| | |
| | |

12. HOLIDAYS (planned)

| Month/Year | Destination | Cost £ |
|------------|-------------|--------|
| | | |

| | | |
|--|--|--|
| | | |
|--|--|--|

13. CAPITAL LIABILITIES/COMMITMENTS (e.g. credit cards, loans, HP/Car lease agreements)

| Loan/Credit Card 1 | |
|------------------------------|------------------------|
| Company: | Outstanding Balance: £ |
| APR: | Monthly payment: £ |
| Term: | Repayment Date: |
| What is the purpose of this? | |

| Loan/Credit Card 2 | |
|------------------------------|------------------------|
| Company: | Outstanding Balance: £ |
| APR: | Monthly payment: £ |
| Term: | Repayment Date: |
| What is the purpose of this? | |

| Loan/Credit Card 3 | |
|------------------------------|------------------------|
| Company: | Outstanding Balance: £ |
| APR: | Monthly payment: £ |
| Term: | Repayment Date: |
| What is the purpose of this? | |

Priority Debts

| | |
|--|--|
| Please detail any priority debts such as CCI's, Charging Orders, Council Tax arrears, or arrears on any credit commitments | |
| | |

* please continue on separate sheet if necessary

14. OTHER DEPENDENTS

| | | | |
|----------------------|--|---------------|--|
| Full Name | | | |
| Male/Female | | Date of Birth | |
| Current School: | | | |
| School Fees Payable: | | | |

| | | | |
|----------------------|--|---------------|--|
| Full Name | | | |
| Male/Female | | Date of Birth | |
| Current School: | | | |
| School Fees Payable: | | | |

| | | | |
|----------------------|--|---------------|--|
| Full Name | | | |
| Male/Female | | Date of Birth | |
| Current School: | | | |
| School Fees Payable: | | | |

| | | | |
|----------------------|--|---------------|--|
| Full Name | | | |
| Male/Female | | Date of Birth | |
| Current School: | | | |
| School Fees Payable: | | | |

15. HOME VISIT

| | |
|--|------------|
| The school or its representatives may wish to visit you at your home address to discuss your application for support. Please indicate whether you are happy to receive a visit from the school's representative. | Yes/ No |
|--|------------|

16(a) VERIFICATION OF INCOME Please enclose documentary evidence in support of the income figures in above. Please tick any of the items below that you are enclosing, items marked * are mandatory.

Your application cannot be assessed without supporting documentation.

| | | | | |
|--|---|--|--|--|
| | * 2021/22 P60 and latest P11D | | Copy of HMRC tax calculation issued under Self-Assessment | |
| | * Latest 3 months Pay Advice and March 22 pay advice (if P60 not available) | | Confirmation of Schedule D self-employment income from an independent accountant | |
| | * Annual Report & Accounts (including Balance Sheet) for the last two years [2020 & 2021] | | | |
| | * 3 Months bank statements for all current and savings accounts | | Other e.g. copies of dividend vouchers, bank interest certificates, rental property details. | |
| | Court Orders and Legal Separation agreements | | Any legal documents covering the payment of school fees and child maintenance | |
| | Letter outlining any Benefits received | | Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living allowance, Incapacity Benefit, Child Benefit | |

| | | | | |
|---|---|---|--------------------------------|---|
| | | | | |
| 16(b) VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing: | | | | |
| | Property Valuation <i>Principle residence plus any investment property</i> | £ | Investment Portfolio Valuation | £ |
| | Mortgage Statement | £ | Contents Insurance | £ |

17. DECLARATION AND SIGNATURE

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

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 a grant is offered 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 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 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 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.

CONFIDENTIALITY

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.
Failure to keep the award confidential may result in its withdrawal.

| | |
|---|-------------------|
| Signatures: (See note on Parents/Applicants) | |
| Parent/Guardian * | Parent/Guardian * |
| Signature: | Signature: |
| Date: | Date: |

Each person with parental responsibility for the child is required to sign this form and the school is entitled to treat any information received from any person who has signed this form as having been on behalf of both or all such persons

If only one person has completed the application form and signed above, please tick the appropriate box to show why:

| | | | |
|----------|--------------------------|-----------------|--------------------------|
| Divorced | <input type="checkbox"/> | Separated | <input type="checkbox"/> |
| Deceased | <input type="checkbox"/> | Living Overseas | <input type="checkbox"/> |
| Other | <input type="checkbox"/> | (explain why) | |

TERMS AND CONDITIONS

If financial assistance is offered and accepted, the following terms and conditions will apply between the Parent(s), Guardian(s) or Carer(s) of the child or children to whom this application relates and the School:

- The fee account with the School will be credited with the amount of the financial assistance for so long as the financial assistance remains in effect.
- Any material change in your financial position must be declared immediately.
- The financial assistance may be withdrawn or reduced if:
 - the Terms and Conditions under the Parent Contract are breached;
 - in the opinion of the Headteacher, your child/ren's attendance, progress or behaviour no longer merit the continuation of the financial assistance;
 - there are fees outstanding and owing to the School in respect of any child you have at St Peter's School, or Sunnylands Nursery or in respect of any child that has left the School, unless you already have an agreed repayment plan in place with the School;
 - there is a material change in your financial circumstances; or
 - the School's resources are insufficient to maintain the level of the financial assistance.
- **The financial assistance will be withdrawn and the value of any amount previously credited against the fees account will become repayable to the School forthwith if false information has fraudulently, knowingly or recklessly been provided in relation to the application for financial assistance.**
- The School respects the confidentiality of financial assistance made to families and recipients are expected to do likewise. Breach of confidentiality may result in the financial assistance being withdrawn.
- By submitting an application for financial assistance you are agreeing that the School may undertake any third party checks to verify the information given in the application. In all cases, the School will abide by the General Data Protection Regulations and personal data will only be disclosed in accordance with the School's published privacy notice.

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

NOTES FOR GUIDANCE FOR COMPLETION OF GRANT APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Bursar 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.

SECTION 2: PARENTS/APPLICANTS

These are defined as:

- a) 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
- b) 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

- c) 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
- d) the person with whom the child resides in accordance with either:
- e) a subsisting residence order made under section 8 of the Children Act 1989; or
- f) 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
- g) 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
- h) 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.
- i) If parents are separated or divorced before or while their child attends the School, both mother and father will be required to complete and sign the Application Form.

SECTION 5: INCOME

- a) The gross monthly 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) Income from self-employment – at the amount of GROSS income declared to HMRC or relevant tax authority for the year in question. Copies of the latest set of accounts should be included. Where the profits assessed relate to a basis period in excess of or less than 12 months please state the length of that period.
- d) All other Investment income (e.g. 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 from letting or subletting of property at the amount of the profit declared to HMRC; net of related expenditure before tax.
- f) All social security benefits received should be declared and type of benefit specified.
- h) 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 (e.g. 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 is 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.
- i) Include free benefits in kind agreed by HMRC as not subject to tax, e.g. representative occupation of house, free canteen.

SECTION 8/9: 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.
- b) Investments in stocks and shares, valued as near as possible to the date of submitting the application form with evidence provided.
- c) The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.
- d) 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.
- e) 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.

SECTION 12: PARENTS'/APPLICANTS' CAPITAL LIABILITIES

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

SECTION 13: OTHER DEPENDENTS OTHER THAN CHILDREN

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 separately including age, address, condition, etc.

ANY OTHER RELEVANT INFORMATION

Please enter below or on a separate sheet if necessary, any details which may affect the assessment of a grant, e.g. a known significant change in financial circumstances or outgoings for the coming year.

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End
