

Westbourne School Confidential Bursary Application Financial Statement

Confidential Statement of Financial Circumstances in support of an application for a Grant

Please read the notes guidance before completing this form. Complete Section 1 to 11.

1. CHILD(REN)		Child 1	Child 2
a	Full Names		
b	Date of Birth		
c	Term/Year of Entry		

2. PARENT CONTACT DETAILS (see note)			
		Parent 1	Parent 2
a	Names		
b	Title		
c	Address		
d	Post Code		
e	Day time Tel		
f	Evening Tel		
g	Mobile		
h	Fax		
i	E Mail Address		

3. PARENTS' OCCUPATIONS			
		Parent 1	Parent 2
a	Employed (insert employer's name, address and phone number)		
	Are you a Director or Shareholder or Proprietor of this Company?	Yes / No	Yes / No
	If "YES" state proportion of Company or Business you and/or your spouse/partner own		
b	Self-employed (complete type of business) / partner in partnership		

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	If a partner, state your share of partnership income and capital, if any		
c	Unemployed		
d	Retired		

4. Income: what money do you receive?

	Person 1	Person 2	TOTAL
	Annual amount £	Annual Amount £	
EARNINGS			
Wages	£	£	£
Other earnings / Profits	£ -	£ -	£ -
OTHER INCOME & BENEFITS			
Child Benefit	£ -	£	£
Child Tax Credit	£ -	£	£
Working Tax Credit	£ -	£ -	£ -
Universal Credit	£ -	£ -	£ -
Carer's Allowance	£ -	£	£
Other benefit	£ -	£	£
Board or lodging	£ -	£ -	£ -
Non-dependant contribution	£ -	£ -	£ -
Child support / maintenance	£ -	£ -	£ -
Student loans	£ -	£ -	£ -
Student grant / bursary	£ -	£ -	£ -
Other income	£ -	£ -	£ -
TAX / NI ETC			
Tax Payable	-£	£ -	-£
NI contributions	-£	-£	-£
Pension Contributions	-£	-£	-£
Other	£ -	£ -	£ -
TOTAL INCOME	£	£	£

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5. Outgoings: what are your living costs?			
	Person 1	Person 2	Ttotal
	Annual Amount £	Annual Amount£	
Fixed costs			
HOME AND CONTENTS			
Rent			
Mortgage			
Council tax			
TV licence			
Secured loans			
Household appliance hire purchase			
UTILITIES			
Electricity			
Gas			
Water			
CARE AND HEALTH COSTS			
Prescriptions and medicine			
Dentistry			
Opticians			
Childcare			
Child maintenance or child support			
Adult care			
TRANSPORT AND TRAVEL			
Car insurance			
Road tax			
Fuel			
Breakdown cover			
MOT and ongoing vehicle maintenance			
Vehicle hire purchase			
Vehicle lease			
Public transport			
PENSIONS AND INSURANCES			
Buildings and contents insurance			
Life insurance			
Mortgage payment protection insurance			
Health insurance			
Pension payment			
PROFESSIONAL COSTS			
Professional courses			
Professional fees			
Union fees			

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SCHOOL COSTS			
School uniform			
After school clubs and school trips			
School Fees			
FOOD & HOUSEKEEPING			
Groceries			
Household repairs and maintenance			
Disabled Daughter Food			
School meals			
Vet bills and pet insurance			
COMMUNICATIONS AND LEISURE			
Home phone, internet and TV package			
Mobile phone			
Hobbies, leisure or sport			
Gifts			
Newspapers, magazines, stationery and postage			
PERSONAL COSTS			
Clothing and footwear			
Toiletries			
Hairdressing			
TOTAL EXPENSES			

6. Priority debts: who do you owe money to?

This could include arrears on any item in Fixed expenses or Flexible expenses such as rent, mortgage or utility bill arrears, etc.

Name of priority lender	Type of debt	Amount Outstanding	How often?	Per calendar month
<i>Example: ABC Bank</i>	<i>Overdraft</i>	<i>£6,000.00</i>	<i>Monthly</i>	<i>100.00</i>
Total debts		Total Priority debt payments		

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7. Assets: what do you own or have you saved?

Type of asset or savings	Capital Value	Capital Liability (Eg remaining mortgage on a property)	Net Assets
House	£	£	£
Savings	£	£	£
Investments	£	£	£
Vehicles	£	£	£
Other	£	£	£
TOTAL ASSETS	£	£	£

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8 Dependent Children					
		1	2	3	4
A	Forename				
B	Date of birth				
C	School or College				
D	Boarding or Day				
FEES£					
E	Annual school other education fees	£	£	£	£
F	Compulsory additional school charges	£	£	£	£
G	Amount of Fees covered by Bursaries / Insurances / Trusts / Charities or other allowances				

9 Verification of Income		
Please enclose documentary evidence in support of the income figures in Section 4, please tick what has been enclosed.		
<i>P60 and P11D</i>	<i>End of year tax certificate for most current year</i>	
<i>March Pay Advice</i>	<i>Confirmation of Schedule D self-assessment income from and independent accountant</i>	
<i>Annual Report & Accounts</i>	<i>P&L and Balance Sheet for year ending (20)</i>	
Court Orders	Covering payment of school fee and child maintenance	
Benefits Received	Universal Credit, Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living allowance, Incapacity Benefit, Child Benefit	

10 Verification of Assets	
Please enclose documentary evidence of capital assets and tick those that are enclosed	
<i>Property Valuation</i>	
<i>Mortgage Statement</i>	
<i>Investment Portfolio Valuation</i>	
Contents Insurance	

The school [will/may] wish to visit your home address(es) to discuss your application for support. Both parents should please indicate whether you are happy to receive a visit from the school's representative

Parent 1 Yes / No

Parent 2 Yes / No

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a bursary from the school are asked first to enquire if they are eligible for assistance from any other source, including family members, family friends, relatives, employers, charities, trusts, and foundations.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result. Please also state what steps you have taken to obtain assistance from any other third party.

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11 DECLARATION

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

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

We understand that if we are offered a bursary for our child and accept a place for him/her at the school, the following terms and conditions will apply as between ourselves and the School:

- a) our child's fees account with the School will be credited termly with the amount of the bursary for so long as the award remains in effect;
- b) any award of a bursary is subject to annual review and we must complete an annual declaration of our financial circumstances on the form sent to us by the School and supply all relevant supporting evidence by the return date indicated;
- c) we will report immediately any material change in the financial position declared;
- d) the Grant may be withdrawn or reduced if:
 - i) we act or our child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our child at the school or in breach of the terms of the bursary award;
 - ii) we have failed to return the annual declaration of our financial circumstances by the return date indicated;
 - iii) we have failed to produce any additional information required by the School to evidence our financial circumstances;
 - iv) in the opinion of the Head, our child's attendance, progress, attitude or behaviour no longer merits the continuation of the award;
 - v) we 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 financial circumstances;
 - vii) the School's resources are insufficient to maintain the level of award,
- e) **IMPORTANT** - the bursary will be withdrawn with immediate effect and the value of any amount of the bursary previously credited against our child's fee account will become repayable to the school forthwith as a debt if we/I have fraudulently, knowingly or carelessly provided false or misleading information in relation to the award of the bursary; and
- f) as otherwise stated in the school's Terms and Conditions as amended from time to time.

Parent 1	Parent 2
Name	Name
Signed	Signed
Date	Date

[NB. Each person with parental responsibility for the child is required to sign this form and, where the parents do not live together in the same household, should provide the requested information in respect of their own household's circumstances]

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GUIDANCE NOTES

NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY 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

The form should be completed by all holders of parental responsibility for the child.

As responsibility for payment of the fees is in most cases 'joint and several', where both parents do not live together in the same household, each parent should complete the form with full details of their own financial circumstances and the circumstances of their own household. Please err on the side of caution and provide as much information as possible.

Please contact the Bursar if you are unsure who should complete this form or have questions about whose financial circumstances should be included.

SECTION 4: INCOME

Insert all income that comes into the house hold for all parties, then deduct payment for Tax, NI and pensions. If you are self-employed please insert your profits or amount on your tax return for the most recent period

SECTION 5: OUTGOINGS

Insert all monthly outgoings for all parties

SECTION 6: PRIORITY DEBTS

Insert all your current debts with Credit cards, Hire Agreements loans etc.

Details should be provided of any outstanding school fee payments or charges and any arrangements entered into with the relevant school in respect of payment

SECTION 7: ASSETS

Details of your assets owned

Properties, investments and vehicles.

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SECTION 8: DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution.

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

g)(iii) 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

(iv) 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 bursary. 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.

(v) 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.

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.

ANY OTHER RELEVANT INFORMATION

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

CONFIDENTIALITY

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.