

stephen perse

foundation

BURSARY ADMINISTRATION LIMITED

on behalf of

Stephen Perse Foundation (School)

BURSARY RENEWAL FORM

Confidential Statement of Financial Circumstances

Please read the Guidance Notes at the end of this document before
completing this form

Assessing your application - Data Protection considerations

The school reserves the right to make all decisions regarding your application for a Bursary, but employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to make the decision.

This means that, for the purposes of your application:

- the school is the Controller of your information
- BAL is the Processor of your information
- BAL is registered with the Information Commissioner's Office and has satisfied the school as to its arrangements regarding the security of any information and documents you may provide as part of your application.

Please note that no application will be considered unless the process as detailed below is followed. **IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:**

1. An Application Form will be completed and sent either to the school or directly to BAL as detailed at the bottom of the form. Supporting paperwork as required must be included.
2. If the Application Form and the supporting paperwork has been sent to the school this will be scanned and forwarded securely to BAL using Microsoft Sharepoint so that BAL may prepare the information in the format required by the school.
3. If you have sent the form and supporting documents straight to BAL any original documents will be stored securely under lock and key and then returned to you at the time of the home visit, or if this is not possible BAL will return any original supporting paperwork to you by 'Signed-for' post. Please ensure that you arrange to collect the envelope if a card is left in your letter-box. If any envelopes are returned to BAL as 'uncalled-for' these will be held securely until the papers' whereabouts are queried.
4. BAL will contact you to make arrangements for a home visit if this has been required by the school, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be.
5. BAL will send its report on your application securely to the school through Sharepoint and will then withdraw from the process unless the school has any further enquiries it wishes BAL to make.
6. BAL will return an original application form securely to the school, shred any scanned/photocopied evidence documents securely using an

authorised service, and scan and store securely on Sharepoint its notes regarding your application; these notes will then be shredded securely using an authorised service. This process is undertaken once per year, and any papers (not your original supporting documents) will be held securely until then.

7. Your electronic records will be kept securely on Sharepoint, and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of considering your application for a Bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

BAL can arrange to share reports between schools if you are applying to more than one school for a Bursary, but this will not be done without your written permission (email will suffice), and the permission of the school on whose behalf BAL first visited.

You are entitled to request that your information be deleted permanently at any time.

It should be noted that the report produced by Bursary Administration is the property of the school and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

FATHER/STEPFATHER

MOTHER/STEPMOTHER

Date: _____

1. CHILD

- a) Full Names _____
- b) Date of birth _____
- c) School applied for _____
*Dame Bradbury's *Junior School *Senior School
*Sixth Form College (please circle relevant school)
- d) Term / year for entry or date of joining _____

2. PARENTS (see note 2)

- | | Father/ Stepfather | Mother/ Stepmother |
|-----------------------------|-----------------------------------------------------------------------|-----------------------------------------------------------------------|
| a) Names and title | _____ | _____ |
| b) Address | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| | _____ | _____ |
| c) Occupation | _____ | _____ |
| d) Employment Status | Retired - Self-employed -
Employed - Unemployed
(please circle) | Retired - Self-employed -
Employed - Unemployed
(please circle) |
| e) Employer name | _____ | _____ |
| f) Shareholding of business | | |
| g) Are you a Co. Director? | | |
| h) Daytime Tel | _____ | _____ |
| i) Evening Tel | _____ | _____ |
| j) Mobile | _____ | _____ |
| k) E-mail | _____ | _____ |

3. FINANCIAL DATA (see note 3)

NOTES

INCOME	PER MONTH	PER YEAR
PAYE 1		
PAYE 2		
BUSINESS DIVIDENDS		
SELF-EMPLOYED INCOME		
PENSIONS		
INVESTMENT INCOME		
BENEFITS:		
Child Benefit		
Child Tax Credits		
Working Tax Credits		
Carer's Allowance		
Disability / PIP		
Housing / Council Tax		
Any other		
MAINTENANCE RECEIVED		
FAMILY SUPPORT		
STUDENT FINANCE		
OTHER INCOME		

RENTAL PROPERTIES (IF ANY)	PER MONTH	PER YEAR
INCOME		
RENTAL INCOME		
EXPENDITURE		
MORTGAGE		
AGENT'S FEES		
OTHER EXPENSES:		
Landlord's Insurance		
Maintenance Contracts		
Ground Rent		
Service Charges		
Certification		
Council Tax		
Utility Bills		
Repairs/maintenance		
Other Expenses		

EXPENDITURE	PER MONTH	PER YEAR
PAYE TAX 1		
PAYE TAX 2		
SELF-EMPLOYED TAX		
NI 1		
NI 2		
PENSION CONTRIBUTIONS 1		
PENSION CONTRIBUTIONS 2		
LIFE INSURANCES/ ENDOWMENTS		
PRIVATE HEALTH		
MAINTENANCE PAID		
MORTGAGE		
RENT		
HOUSE INSURANCE		
COUNCIL TAX		
ELECTRIC		
GAS/OIL/WOOD/OTHER		
WATER		
OTHER HOUSEHOLD INS		
FOOD/SUBSISTENCE/SCHOOL LUNCHES		
CLOTHING		
LANDLINE/BROADBAND/TV		
MOBILES		
TV LICENCE		
TV PACKS		
MEDICAL EXPS		
PET EXPS		
PUBLIC TRANSPORT EXPS		
CAR FINANCE 1		
CAR FINANCE 2		
FUEL (ALL CARS)		
CAR TAX (ALL CARS)		
CAR INSURANCE (ALL CARS)		
MAINTENANCE (ALL CARS)		
BREAKDOWN COVER		
PARKING		
TUTORS (ACADEMIC/MUSIC)		
CLUBS AND ACTIVITIES		
CHILDCARE / NURSERY		
LOAN REPAYMENTS		
CREDIT CARD REPAYMENTS		

DEBT MANAGEMENT REPAY		
-----------------------	--	--

NOTES

ASSETS	FATHER	MOTHER	COMBINED
FAMILY HOME			
OTHER UK PROPERTY			
FOREIGN PROPERTY			
CURRENT ACCOUNT			
DEPOSIT ACCOUNT			
SHARES/EQUITIES			
ISAs			
PREMIUM BONDS			
FIXED TERM BONDS			
OTHER INVESTMENTS			
PENSION (IF OVER 55)			
SETTLEMENTS DUE			
DECLARED INSURANCE ITEMS			
VEHICLES (OVER 2)			
VALUE OF BUSINESS			

LIABILITIES (MONIES OWED)	FATHER	MOTHER	COMBINED
MORTGAGE (FAMILY HOME)			
SECURED LOANS			
OTHER UK MORTGAGES			
FOREIGN MORTGAGES			
COMMERCIAL LOANS			
FAMILY LOANS			
FINANCE LEASES			
CREDIT CARDS			
ARREARS			
SCHOOL FEE ARREARS			
DEBT MANAGEMENT			

If properties, other than the family home, are owned please list full addresses below:

Please list any other items of expenditure:

4. DEPENDENT CHILDREN

NOTES

(see note 4)

	Applicant	Child 2	Child 3	Child 4
a) Forename				
b) DOB				
c) Current school				
d) Boarding or day				
e) Annual fees				
f) Compulsory extras				
g) Uniforms				
SUB TOTAL (a-g)				
h) Fees covered by:				
i) School scholarships / bursaries / allowances				
ii) Family assistance				
iii) Other assistance				
iv) Child's income				
SUB TOTAL (hi-iv)				
TOTAL (a-g) LESS (h)				

5. OTHER DEPENDENTS (see note 5)

DOCUMENTS TO BE SUPPLIED

Please supply copies of the following documents:

Last 3 payslips

Last P60

Latest audited accounts (if appropriate)

Latest management accounts (if audited accounts are more than 9 months old)

Latest self-assessment tax calculation (if appropriate)

Schedule D self-employment income declaration (if appropriate)

3 months' bank statements

Proof of value of investments (may include internet valuation)

Latest pension and endowment valuation

Benefit letters (if appropriate)

Latest mortgage statement (on all properties if appropriate) / rent agreement

Latest loan statements

Contents insurance schedule

Legal financial agreements

Any other appropriate documents to support your application

PLEASE DO NOT SEND ORIGINAL DOCUMENTS UNLESS SPECIFICALLY ASKED TO. COPY DOCUMENTS WILL NOT BE RETURNED UNLESS SPECIFICALLY REQUESTED HERE.

YOU WILL BE NOTIFIED THE FINAL RESULT BY THE SCHOOL DIRECTLY

DECLARATION

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 declaration of our/my income and assets.

We/I understand that we/I are/am applying for our/my child and accept a place for him/her at the school:

- a) Our/my child's fees account with the school will be credited termly with the amount of the grant
- 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 the school or its agent 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 grant 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 to the acceptance of a place for our/my child at the school
 - 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) there is in the view of the Head either unsatisfactory work or conduct
 - vi) the school's resources are insufficient to maintain the level of the award

Signatures:

Father / Stepfather _____ Date_____

Mother / Stepmother_____ Date_____

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

Divorced / separated / widowed

Other (state reason)

Please return this form and all documents to:
BURSARY ADMINISTRATION LIMITED, Warwick House, The Priory, East Farleigh, Kent,
ME15 0EX
Telephone 01622 725712 or email admin@schoolbursaryguide.com for all queries

GUIDANCE NOTES

Please read these carefully before completing the Application Form. If you need further help, please contact Bursary Administration.

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 an Application Form

3. FINANCIAL DATA

- Gross salaries for both parents
- Dividends received from an owned limited company
- Net self-employed income before tax
- Pensions received
- Gross investment income
- Benefits received
- Maintenance payments received (formal or informal)
- Support from family or friends
- Any other income
- Rental properties - income and expenses
- Maintenance payments being made
- Family expenditure detailed in the form
- Combine assets and liabilities according to type

Please either show assets by father/mother or combined as appropriate.

4. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 - 4 for any other dependents.

e) Please refer to the current academic year

h) (iii) Please state any other educational allowances received. If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year.

(iv) If the child is in receipt of financial assistance from a Trust Deed or other external source please declare the annual amount available, and please enter the gross amount of any interest / share dividends received by the child

5. OTHER DEPENDENTS

Please provide details of any other family members who are financially dependent upon you.

6. ANY OTHER RELEVANT INFORMATION

Please enter, on the sheet provided if necessary, any details which may affect the assessment of the grant, for example a significant change in income or outgoings for the coming year.

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