

Office Use

Wynstones

Fee Assistance Application Form 2015 – 2016 School Year

| | |
|---------------|-----------|
| | Sage code |
| Date received | Checked |

This form is for use from **May 2015** by Wynstone's parents.

Sections A to D inclusive - To be completed by **all applicants**.

Section E - If one or both parents is self-employed

Section F - If one or both parents owns or part-owns a company or LLP

Section G - If you are separated from your children's other parent

Section H - If you own additional properties other than your main residence

Please supply photocopies of any documents you supply. Originals will not be returned.

SECTION A – PUPIL AND PARENT DETAILS

Please tick here if you have applied for bursary assistance in the last year. (tick box)

Please tick here if you are in receipt of bursary assistance for 2014 – 2015. (tick box)

| Full Name of each Pupil | Current Class | Class in Sept 15 |
|-------------------------|---------------|------------------|
| | | |
| | | |
| | | |
| | | |

Address:

Postcode:

| | Full Name of parent / guardian and partners who share the above address. | Relationship to pupils (e.g. mother, step-father, partner) | Daytime phone number |
|----|--|---|----------------------|
| 1. | | | |
| 2. | | | |

Email address 1:

Email address 2:

SECTION B – INCOME

Income from employment

Include here income earned as an **employee**. Do not include self-employed income or income from any company of which you own more than 25% of the shares.

| | Parent/ Guardian 1 | | Parent/ Guardian 2 | |
|--|--------------------|--------------------|--|---|
| Occupation | | | | |
| | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>This column is for Office Use only</i> |
| Actual Gross income, last 12 months | £ | £ | March 2015 payslip or P60 | |
| Forecast Gross income, next 12 months | £ | £ | Notice of pay rise or reduction. Date of annual pay review | |
| Tax payable for 2014-15 | | | March 2015 payslip or P60 | |
| National Ins. for 2014-15 | | | March 2015 payslip or P60 | |
| Cost of travel to/from regular place of work if exceeding 20 mile radius of home address | | | Details of place of employment and form of transport | |

State benefits: It is a mandatory requirement of fee assistance at Wynstones that applicants apply for, obtain and declare all state benefits to which they are entitled before requesting fee assistance.

Information on your entitlements can be found at www.entitled2.com

| Provide ANNUAL figures: | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required |
|--------------------------------|--------------------|--------------------|------------------------|
| Child Benefit | £ | £ | Copy of award notice |
| Child Tax Credit | £ | £ | Copy of award notice |
| Working Tax Credit | £ | £ | Copy of award notice |
| Housing Benefit | £ | £ | Copy of award notice |
| Council Tax Benefit | £ | £ | Copy of award notice |
| Income Support | £ | £ | Copy of award notice |
| Job Seekers allowance | £ | £ | Copy of award notice |
| Widow/ers Benefit | £ | £ | Copy of award notice |
| Other State Benefit | £ | £ | Copy of award notice |

Other incomeProvide **ANNUAL** figures:

| | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>This column is for Office Use only</i> |
|------------------------|-----------------------|-----------------------|-----------------------------|---|
| State pension income | £ | £ | Copy of formal notification | |
| Other pension income | £ | £ | Copy of recent statement | |
| Income from lodgers | £ | £ | | |
| Investment income | £ | £ | Copy of recent statement | |
| Self employed income | Complete Section E | | | |
| Limited company income | Complete Section F | | | |
| Maintenance income | Complete Section G | | | |
| Income from property | Complete Section H | | | |
| Any other income | £ | £ | <i>Give details below</i> | |

Details of other income:

SECTION C – DETAILS OF PUPILS’ MAIN RESIDENCEComplete the following if you **own** or part-own the property

| | | | |
|-------------------------------------|---|------------------------|--|
| Market value of the property | £ | Valuation if available | |
| Mortgage outstanding | £ | Latest statement | |
| Mortgage payment for last 12 months | £ | Latest statement | |
| Annual Council Tax payable | £ | Latest advice notice | |

Type of Mortgage (Tick one box)

Capital repayment

Interest only

Complete the following if you are a **tenant** in the property

| | | | |
|---------------------------------|---|----------------------|--|
| Rent payable for last 12 months | £ | Rental agreement | |
| Annual Council Tax payable | £ | Latest advice notice | |

SECTION D – OTHER CAPITAL ASSETS

State the current value of other assets which you own excluding additional properties and private limited companies

| | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>This column is for Office Use only</i> |
|------------------------------|-----------------------|-----------------------|---------------------------|---|
| Current and savings accounts | £ | £ | Latest statement | |
| Savings bonds or similar | £ | £ | Latest statement | |
| Stock market investments | £ | £ | Latest valuation | |
| Other significant assets | £ | £ | | |

SECTION E – SELF EMPLOYED INCOME

Complete this section if you are **self-employed** but do not own a limited company.

Nature of self-employed activity:

When did you commence this activity?

Do you have any business partners? If so, please provide details:

Self employed income must be verified by the provision of business accounts and a copy of your **full tax return** for the last two years.

For the current year, please provide whatever **management accounts** information you have available.

| Provide ANNUAL figures: | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>Office Use only</i> |
|---|-----------------------|-----------------------|-----------------------------|----------------------------|
| Actual Gross income – average of last two years | £ | £ | Accounts and tax returns | |
| Forecast Gross income - next 12 months | £ | £ | Management accounts | |
| Tax payable 2014/15 | £ | £ | Tax return | |
| National Ins. payable 14/15 | £ | £ | | |

SECTION F – INCOME FROM YOUR OWN COMPANY OR LLP

Complete this section if you **own 25% or more of a company or LLP**.

| Name of Company | Company number | Date of incorporation |
|-----------------|----------------|-----------------------|
| | | |

Business activity of company

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

Ownership details (include names of shareholders and indicate if other shareholders are related to you)

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

Income from your own company must be verified by the provision of financial accounts and a copy of your full tax return for each of the last two years for which data is available.

| Provide ANNUAL figures: | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>For Office Use only</i> |
|--|--------------------|--------------------|--------------------------|----------------------------|
| Salary drawn - average of last two years | £ | £ | Accounts and tax returns | |
| Dividend income – average of last 2 years | £ | £ | Accounts and tax returns | |
| Any other cash drawings – average of last 2 years | £ | £ | Accounts and tax returns | |
| Forecast income (aggregate of the above categories) for next 12 months | £ | £ | Management accounts | |
| Tax paid 2013/14 | £ | £ | Tax return | |
| Tax paid 2014/15 | £ | £ | Tax return | |
| National Ins. paid for 13/14 | £ | £ | | |
| Estimate/Forecast for 2015/16 | £ | £ | | |

For the current year, please provide whatever **management accounts** information you have available.

SECTION G – MAINTENANCE INCOME

Complete this section if you are **separated** from your children's other parent.

Are you in receipt of maintenance income in respect of your children? Yes No

If yes, has the amount payable been determined by a court or the Child Support Agency or is it a voluntary payment?

Enforced Voluntary

If no, have you attempted to enforce payment of maintenance? Please give details.

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

| | |
|---|-----------|
| Name of non-resident parent: | Phone no: |
| Contact address of non-resident parent: | |
| Postcode: | |
| Email: | |

| Provide ANNUAL figures: | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>For Office Use only</i> |
|--------------------------------|--------------------|--------------------|---|----------------------------|
| Maintenance income | £ | £ | Court order or CSA correspondence (if applicable) | |

SECTION H – SECOND AND SUBSEQUENT PROPERTIES

Complete this section if you own or part-own a property **which is not your main residence**. If you own two or more such properties, provide aggregate figures.

| | Parent/ Guardian 1 | Parent/ Guardian 2 | Documentation required | <i>For Office Use only</i> |
|---|-----------------------|-----------------------|---------------------------|--------------------------------|
| Market value of property | £ | £ | Valuation if available | |
| Mortgage outstanding | £ | £ | Latest statement | |
| Mortgage payment for last 12 months | £ | £ | Latest statement | |
| Gross annual rental income before tax (if any) | £ | £ | Accounts | |

Address of second or subsequent property:

If you part-own this property give details of the other owners and indicate their relationship to you.

Please use this space below to provide any further details which you feel may be useful in processing your application for fee assistance.

CONFIRMATION OF SECTIONS COMPLETED

Please **tick** one box for each section to confirm that your form is complete.

| Section | Completed | Not Applicable |
|-----------------------------------|-----------|----------------|
| Sections A – D inclusive | | |
| Section E – Self employment | | |
| Section F – Own limited company | | |
| Section G – Maintenance income | | |
| Section H – Additional properties | | |

If this form is incomplete or received without full supporting evidence it will be returned to you unprocessed.

DECLARATION

| Parent/ Guardian 1 | Parent/ Guardian 2 |
|---|---|
| <p>I declare that the information provided on this form is a complete and truthful statement of (i) my income from all sources and (ii) my assets of all kinds.</p> <p>I undertake to notify Wynstones School immediately should there be any material change to my financial circumstances.</p> <p>I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the school will become immediately repayable as a debt.</p> <p>I agree to be jointly and severally liable for this undertaking with parent/ guardian 2.</p> | <p>I declare that the information provided on this form is a complete and truthful statement of (i) my income from all sources and (ii) my assets of all kinds.</p> <p>I undertake to notify Wynstones School immediately should there be any material change to my financial circumstances.</p> <p>I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the school will become immediately repayable as a debt.</p> <p>I agree to be jointly and severally liable for this undertaking with parent/ guardian 1.</p> |
| Full name | Full name |
| Signature | Signature |
| Relationship to pupil | Relationship to pupil |
| Date | Date |

Fee assistance at Wynstones is subject to the following conditions:

- Payment of fees is by twelve equal monthly instalments commencing 1st August 2015.
- All prior debts to the school are either repaid or subject to an agreed repayment plan.

The school will conduct a detailed audit of a sample of recipients which may include a home visit.