



# Beaconhurst School

52 Kenilworth Road, Bridge of Allan, Stirling, FK9 4RR

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## APPLICATION FORM FOR FINANCIAL ASSISTANCE (Declaration of Income and Application for Assistance with Tuition Fees)

Academic Year: .....

PLEASE READ THE ATTACHED NOTES CAREFULLY AND THEN COMPLETE THE FORM IN  
BLOCK LETTERS USING BLACK INK

### FULL NAME OF CHILD:

Date of Birth:

School Class:

Child's Home Address:

Address for Correspondence (if different):

.....  
.....

Postcode: .....

Postcode: .....

Parent(s) telephone number(s):

Full name of parent (s):

Home: .....

Work: .....

### DECLARATION:

You should ensure that you have both read Notes 1-4 carefully before signing the following declaration.

I/We declare that to the best of my/our knowledge and belief, all the particulars here submitted are true and contain a full statement of my/our income from all sources during the periods shown. I/we understand that the provision of false information may lead to my/our child being disqualified from assistance with tuition fees.

Signature: Father ..... Date: .....

Mother ..... Date: .....

If the above declaration is signed by only one parent, please tick the appropriate box to show why

Divorced

  

Separated

  

Deceased

Living Overseas

Other (explain) .....

If divorced or separated you will be required to provide documentary evidence. See Note 2.

THIS FORM MUST BE RETURNED NO LATER THAN .....

To: The Bursar, Beaconhurst School, 52 Kenilworth Road, Bridge of Allan, FK9 4RR

FAILURE TO DO SO MAY RESULT IN YOU BEING CHARGED FULL FEES FOR ALL OR PART  
OF THE SCHOOL YEAR

Registered Office: Beaconhurst Grange Ltd, 52 Kenilworth Road, Bridge of Allan, FK9 4RR

A Company limited by guarantee no SCO39250, Registered Charity no SCO05753



**5. PARENTS' INCOME** Please complete the table below showing income from all sources, before deduction of tax, for the most recent tax year (see note 5). Enter amounts in whole pounds or NIL in all places where applicable. Parents must provide copies of documentary evidence for **ALL** income declared in this section.

Income – Please give annual amounts		Actual £	FOR SCHOOL USE ONLY
1.	Gross Earned / Income (including Overtime)		
	Father .....		
	Benefits in Kind .....		
	Mother .....		
	Benefits in Kind .....		
2.	<b>Pension</b>		
	State		
	Father .....		
	Mother .....		
	Employers		
	Father .....		
	Mother .....		
	Other		
	Father .....		
	Mother .....		
3.	<b>State Benefits (See Note 8)</b>		
	Child Benefit .....		
	Widowed Mothers/Widows Allowance .....		
	Attendance/Mobility .....		
	Disability Living/Allowance .....		
	Statutory Sick Pay .....		
	Job Seekers Allowance .....		
	Employment & Support Allowance/Family Credit .....		
	Housing Benefit .....		
	Council Tax Benefit .....		
	Other (please state) .....		
4.	<b>Maintenance</b>		
	Court Order .....		
	Private .....		
5.	<b>Investments</b>		
	Bank Deposit Accounts .....		
	Building Society (See Note 10) .....		
	Share Dividends (See Note 11) .....		
	Property Income (See Note 19) .....		
	Sub lettings/Lodgers (See Note 9) .....		
	Other (please state) .....		
<b>TOTAL INCOME/BENEFIT</b>		£	

**LIABILITIES**

Mortgage Outstanding	£.....
Bank Overdraft	£.....
Credit card outstanding	£.....
Loans outstanding	£.....
Household Bill Arrears	£.....
Other Debts	£.....

<b>6. PARENTS' EXPENDITURE</b>		
<b>Expenditure – Please give annual amounts</b>	<b>Actual £</b>	<b>FOR SCHOOL USE ONLY</b>
1.     Income Tax .....		
National Insurance .....		
Pension Scheme .....		
Mortgage/Rent .....		
Council Tax .....		
Water Charges .....		
2. <b>Insurances</b>		
Endowment .....		
Buildings .....		
Contents .....		
Personal .....		
3. <b>Heating/Lighting</b>		
Electricity .....		
Gas/LPG .....		
Oil .....		
Coal/Wood .....		
4. <b>Living Expenses</b>		
Food .....		
Clothing .....		
Other household .....		
Telephone .....		
TV Licence/Rental .....		
5. <b>Transport</b>		
Vehicle Road Tax .....		
Insurance .....		
Petrol/Servicing .....		
Public Transport .....		
6. <b>Education</b>		
School fees .....		
Other School Expenses .....		
University Expenses .....		
7. <b>Miscellaneous</b>		
Repairs/Maintenance .....		
Holidays .....		
Child Maintenance Payments .....		
Child Care .....		
Others (please state) .....		
<b>TOTAL EXPENDITURE</b>	<b>£</b>	

**7. DECLARATION OF CAPITAL RESOURCES AND ASSETS**

- a. Current balance of any Bank account (See Note 16) £ .....
- b. Current balance of any Building Society account (See Note 16) £ .....
- c. Current value of any stocks, shares, bonds or policies (please list on a separate sheet – See Note 17) £ .....
- d. Current value of residence £ .....
- e. Value of any other properties £ .....
- f. State the community charge band that applies to your primary dwelling house (See Note 18) .....
- g. List any other asset that has a value over £10,000. Please include motor vehicles (See Note 19)
  - 1. Type ..... £ .....
  - 2. Type ..... £ .....
  - 3. Type ..... £ .....

Please continue on separate sheet if necessary

**8. VERIFICATION**

Note 20 explains that documentary evidence must be enclosed in support of the income figures in section 5. Please tick those which you are enclosing. **Where the appropriate document is not available**, please enter the date by which you will be able to produce it.

- |   |                          |   |                          |
|---|--------------------------|---|--------------------------|
| - P60   | <input type="checkbox"/> | - Inland revenue self assessment return | <input type="checkbox"/> |
| - Most recent pay advice                                  | <input type="checkbox"/> | - Inland revenue tax calculation        | <input type="checkbox"/> |
| - Verification of superannuation or pension contributions | <input type="checkbox"/> | - Copy of business accounts             | <input type="checkbox"/> |
|   |                          | - Accountant's statement                | <input type="checkbox"/> |
| - Most recent copy of Bank statement(s)                   | <input type="checkbox"/> | - Other (please specify)                | <input type="checkbox"/> |
| - Most recent copy of Building Society statement(s)       | <input type="checkbox"/> |   |                          |

**Date upon which the documentary evidence will become available .....**

**THE SCHOOL RESERVES THE RIGHT TO SEE ANY OTHER DOCUMENTARY EVIDENCE. EVIDENCE MAY BE SOUGHT ON FIGURES SUBMITTED OR ON INFORMATION OTHERWISE OBTAINED WHICH IT DEEMS NECESSARY IN ORDER TO DETERMINE FEE REMISSION.**

**9. DEPENDENT CHILDREN**

Give details in respect of all children wholly or mainly dependent on the parents including the child applying for assistance.

- 1. .... Date of Birth .....
- 2. .... Date of Birth .....
- 3. .... Date of Birth .....
- 4. .... Date of Birth .....

**10. OTHER DEPENDENTS**

Give details of any other person (s) residing in the family home who are wholly or mainly financially dependent on the parents (See Note 15).

Name ..... Relationship .....

Source of Income ..... Amount of Income £.....

Name ..... Relationship .....

Source of Income ..... Amount of Income £.....

Give details of any other dependent children that are in receipt of Financial Assistance, a Bursary or a Scholarship at another school:

Name ..... School .....

Name ..... School .....

Name ..... School .....

**11. SOURCE OF FUNDING**

Are there any other sources of funding available to the family? For example, grandparents who may be willing to help with school fees? YES  NO

If yes, please state amount to be paid in the current school year £.....

**What contribution do you feel you could make toward annual tuition fees?**  
£.....

Please use the area below for any additional information that you think might be of assistance to the school in determination of fee remission:

## APPLICATION FOR ASSISTANCE WITH TUITION FEES

### NOTES FOR PARENTS COMPLETING THE DECLARATION OF INCOME

These notes are provided for the guidance of parents completing the Declaration of Income form. If you have any difficulty answering any of the questions, please contact The Bursar. Please ensure that the Declaration of Income form is returned to the school by the due date. **Failure to meet the specified deadline may result in refusal of the application.**

### DECLARATION CONCERNING VALIDITY OF INFORMATION

1. Parents are reminded that if false information is knowingly or recklessly provided in any particular section, Beaconsfield School may disqualify any or all the parents' children from receiving financial assistance from the School.
2. The declaration on the front of the form should be signed by both parents of the child for whom the application is made, or if only one parent signs, the reason for that must be given (e.g. divorced or separated). **If parents are divorced or legally separated, the School will require a copy of the entire divorce or separation agreement.**
3. Under normal circumstances parents will be assessed on income in the most recent tax year. The School can however assess parents' income on a current year's basis where significant and unforeseen changes in family circumstances occur.
4. Where a parent is required by a court order to pay all or part of the tuition fees for a child, then only that part of the tuition fee which is not covered by the court order will be considered by the School. This is irrespective of whether or not the order is being complied with.

### INCOME

5. Actual income should be declared for the most recent tax year. In the case of self employed persons and others who have not finally agreed their income for the tax year with HM Inspector of Taxes, they should provide an estimate of income in that year.
6. As a general principle gross income before tax should be declared. Income from **ALL** sources must be included. In **ALL** cases income arising outside the UK should be included. **NO DEDUCTIONS** should be made in respect of allowances made for tax purposes – specifically: personal allowances, superannuation, donations direct to charities, mortgage interest, covenants, income from abroad and capital allowances. The amount to be declared should include any amounts received as profit related pay or by virtue of a salary surrender value scheme.
7. The amounts quoted for earned income should include:
  - a. The gross amount of salaries and wages and superannuation, including earnings from profit related pay, part-time employment and any sum received as bonus, commission, statutory sick pay, statutory maternity pay, statutory paternity pay, statutory adoption pay etc.
  - b. Profits from a business or profession – at the amount of gross income as shown in the self-assessment return as agreed by HM Inspector of Taxes for the year in question. **NO DEDUCTIONS** are to be made in respect of capital allowances, depreciation, losses and stock relief. The amount of any balancing charges or stock relief recovery charges should be included.
  - c. Drawings from a partnership or business as stated in your audited accounts or by your accountant.
  - d. Benefits in kind (e.g. fee or subsidised housing, meals or cars) at the amount agreed for tax purposes.
8. If you are in receipt of any social security benefits, you are required to declare **ALL OF THEM** in section 5.3, the School will determine which benefits will be regarded as income in determining the level of assistance. You are also required to supply documentary evidence to support benefits you are in receipt of.
9. Income from the letting or sub-letting of property should be declared – at the amount of the net profit agreed with HM Inspector of Taxes.
10. The net amount of building society interest, bank interest and some local authority interest, actually received during the financial year should be entered; the School will make the appropriate adjustment to take account of the tax deemed to have been paid. If you receive interest gross of tax, please indicate this on the form in the appropriate section.
11. All other investment income (e.g. interest on National Saving Bank deposits), dividends, annuities should be entered gross of tax. Reinvested dividend income from personal equity plans should be also disclosed. The taxable amount only should be included where income is received under an insurance policy.
12. Parents receiving maintenance payments or separation allowances under a court order or Child Support Maintenance Order made by the Child Support Agency or separation deed should enter the gross amount paid in the year (whether tax on that amount was paid by the maintainer or the maintainees). This applies irrespective of whether the order is being complied with.

13. Parents should declare any redundancy payments and any 'golden handshakes' etc.
14. Amounts entered under any other income should include any capital gains exceeding the annual exemption for individuals in the most recent tax year. Sale of property or assets, that is not your primary dwelling house.
15. Parents should declare the gross amount of all income by children who are wholly or mainly dependent on them, excluding only sums earned from part-time employment (including vacation jobs). Income received under deeds of covenants should be included.
16. Parents should declare the balance of their current bank account(s) and their building society account(s). Parents should also provide a photocopy of the most recent bank or building society statement(s).
17. Parents should declare the value of any stocks, shares, bonds or policies held by you or by any of your dependent relatives. Please supply a list with your declaration, if appropriate.
18. Parents should declare the community charge band that applies to your primary dwelling house as at 5 April, of the most recent tax year.
19. In section 7, parents are required to declare the type and the approximate value of all assets over £10,000; this is to include other properties, motor vehicles, sailing yachts, time-shares, etc.

#### **VERIFICATION OF INCOME**

20. The following documentary evidence of the earned income entered in section 5 of the form, if an estimate of income is declared, parents must state the most likely date when actual figures will become available to the School.
  - a. Where income is derived from salary, wages etc – a copy of P60 and the most recent pay advice supplied by Employers.
  - b. Salaried directors of private limited companies – a form P60 and appropriate self-assessment return using the supplementary pages for employment.
  - c. Where a parent is self-employed – a copy of the completed self-assessment return made to the Inland Revenue or, if this is not yet available, copy of the latest audited business accounts or, a statement by your accountant. The actual profits for that year must be computed and stated for the purposes of assessing fee remission. To validate the figures submitted the School may later require sight of an Inland Revenue letter confirming the amount of tax due and paid.
  - d. Benefits in Kind – to be shown as an amount, i.e. the figure on which they are taxed. This will be found on either a Schedule Tax assessment or appropriate Notice of Coding issued by the Inland Revenue.
  - e. Profit related pay – should be verified by means of a letter provided by an employer which should set out details of any income received as profit or by virtue of salary surrender scheme.
  - f. Capital resources – parents should supply photocopies of the most recent bank and building society statements. The School may request documentary evidence in support of stocks and shares, motor vehicles, properties, etc.

**Parents must provide documentary evidence of all income figures in all of sections 5 and 7. Failure to disclose this information may result in the refusal of a fee remission.**

#### **AGENTS (i.e. Accountant or Solicitor)**

21. If an agent is handling details of your income on your behalf please indicate at item 4 whether the School may make contact direct with the agent, if required.

#### **FEES IN LIEU OF NOTICE**

22. Where a pupil is withdrawn from the School without prior notice having been given, parents' liabilities for fees in lieu will stand.

#### **REVIEW**

23. The level of award will be reviewed from time to time, to ensure that the family's financial circumstances have not improved sufficiently to reduce or remove the financial assistance.

#### **PERSONAL DATA**

24. Whilst this process may appear to be intrusive you can be assured that personal data will be securely stored and details will not be disclosed to any other party.
25. The information is solely used by Beaconsfield for the purposes of determining financial assistance awards.