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**IAPS School Access Scheme family application form**

**Confidential statement of financial circumstances**

Please read the guidance notes before completing this form

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| 1. | **CHILD** |  | **NOTES** |
|  | a) Full names | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | b) Date of birth | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | c) School applied for  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | d) Term / year of entry | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 2.  | **PARENTS** | (see note 2) |  |
|  |  | **Father/ stepfather** | **Mother/ stepmother** |
|  | a) Names | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | b) Title | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | c) Address | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | d) Occupation | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  |  |  |
|  | e) Employment status | Retired – self-employed – employed – unemployed(please circle) | Retired – self-employed – employed –unemployed (please circle) |
|  | f) Employer details | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | g) Are you a director/ proprietor? (% share holding) | YES/NO\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | YES/NO\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | h) Daytime tel | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  Evening tel | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  Mobile | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  E-mail | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

|  |  |  |  |  |
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| 3.  | **INCOME** | (see note 3) |  |  |
|  | **Please use annual amounts** | **Father £** | **Mother £** |  |
|  | a) Gross salary and other earnings |  |  |  |
|  | b) Business or  professional profits |  |  |  |
|  | c) Gross pensions |  |  |  |
|  | d) Gross investment income |  |  |  |
|  | e) Gross rents received |  |  |  |
|  | f) Benefits received |  |  |  |
|  | g) Maintenance received |  |  |  |
|  | h) Court order /  separation agreement  – school fees receivable |  |  |  |
|  | i) Benefits in kind  received free |  |  |  |
|  | j) Any other income |  |  |  |
|  | **TOTAL** |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 4. | **OUTGOINGS** | (see note 4) |  |
|  | **Please use annual amounts** | **Father £** | **Mother £** |
|  | a) Tax on incomes above |  |  |
|  | b) NI contributions |  |  |
|  | c) Pension contributions |  |  |
|  | d) Mortgage payments on  main residence |  |  |
|  | e) Endowment payments |  |  |
|  | f) Other insurances |  |  |
|  | g) Rent - main residence |  |  |
|  | h) Rates and utilities |  |  |
|  | i) Other interest payable |  |  |
|  | j) Loan repayments |  |  |
|  | k) Food and subsistence |  |  |
|  | l) Clothing |  |  |
|  | m) Vehicle costs |  |  |
|  | n) Leisure |  |  |
|  | o) Holidays |  |  |
|  | **TOTAL** |  |  |
|  |  |  |  |
| 5. | **CAPITAL ASSETS** | (see note 5) |  |  |
|  | **Approximate market value** | **Father £** | **Mother £** |  |
|  | a) i) Bank / building  society balances |  |  |  |
|  |  ii) Equity / bond values |  |  |  |
|  |  iii) PEPs/ISAs/TESSAs |  |  |  |
|  | b) Pension schemes |  |  |  |
|  | c) Value of main residence |  |  |  |
|  | d) Value of other properties |  |  |  |
|  | e) Value of vehicles |  |  |  |
|  | f) Net worth of business |  |  |  |
|  | g) Redundancy or other employment settlements  due |  |  |  |
|  | h) Insurance settlements  due |  |  |  |
|  | **TOTAL** |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| 6.  | **CAPITAL LIABILITIES** | (see note 6) |  |
|  |  | **Father £** | **Mother £** |
|  | a) Mortgage amount  outstanding |  |  |
|  |  Mortgage final payment date |  |  |
|  | b) i) loans |  |  |
|  |  ii) credit cards |  |  |
|  |  iii) finance leases |  |  |
|  | **TOTAL** |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **SUMMARY** | **Father £** | **Mother £** |
|  | Income |  |  |
|  | Deduct outgoings |  |  |
|  | **TOTAL** |  |  |
|  | Capital assets |  |  |
|  | Deduct capital liabilities |  |  |
|  | **TOTAL** |  |  |

Please indicate why net assets cannot be converted or used to pay school fees

|  |  |  |  |  |  |  |
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| 7. | **DEPENDENT CHILDREN** | (see note 7) |  |  |  |  |
|  |  | **Child 1** | **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) Annual sum arising from Lump Sum Payment Scheme |  |  |  |  |  |
|  |  iii) Educational allowances |  |  |  |  |  |
|  |  iv) Educational insurances |  |  |  |  |  |
|  |  v) Family assistance |  |  |  |  |  |
|  |  vi) Other assistance |  |  |  |  |  |
|  | i) Child’s  income |  |  |  |  |  |
|  | **SUB TOTAL****(h-i)** |  |  |  |  |  |
|  | **TOTAL a-g****LESS h-i** |  |  |  |  |  |

8. **OTHER DEPENDENTS** (see note 8)

9. **ANY OTHER RELEVANT INFORMATION** (see note 9)

10. **DOCUMENTS TO BE SUPPLIED**

Please supply originals 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)
* Three 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

**All documents will be returned securely once the application has been processed. You will be notified of the final result by the school directly**

11. **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:
1. Our/my child’s fees account with the school will be credited termly with the amount of the grant
2. 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 sent to us/me by the school or its agent and supply all relevant supporting evidence by the return date indicated
3. We/I undertake to report immediately any material change in the financial position declared
4. We /I agree that the Charity may contact the school(s) to discuss this application and the information I/we have provided.
5. The grant may be withdrawn or reduced and, in certain circumstances, past payment reclaimed if:
	1. there is a breach of the school’s Terms and Conditions to the acceptance of a place for our/my child at the school
	2. we/I have knowingly and/or recklessly provided false information
	3. we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated
	4. we/I have failed to produce any additional information required by the school or its agent to evidence our/my financial circumstances
	5. there is, in the view of the head, either unsatisfactory work or conduct
	6. the school’s resources are insufficient to maintain the level of the award

**Signatures:**

Parent 1 / stepparent 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Parent 2/ stepparent 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ 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 the school**

(who will forward it to the Grants Secretary, iTrust)