

I TRUST

IAPS SCHOOL ACCESS SCHEME

FAMILY GUIDANCE NOTES

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

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 the Application Form

3. INCOME

a) The gross annual amount of income **FROM ANY SOURCE** for the current or latest financial year

b) Profits from a business or profession - the gross amount agreed for taxation purposes. Deductions should only be made in respect of capital allowances, losses and stock relief. Please include the latest set of accounts.

d) All investment income, including building society interest, should be shown gross

e) Gross income from letting or sub-letting of property

f) Please list on a separate sheet if necessary all social security benefits, naming their type and how long each have been received for

g) All income from maintenance payments, separation allowances and Child Support maintenance must be declared. Arrears in any payments will not be taken in to account.

h) Where a parent is required by any Court or legal order to pay part of the school fees then only the part of the fee which is not covered by the order will be used to calculate any grant awarded. Arrears in any payments of part schools fees will not be taken in to account.

i) Include free benefits in kind that are agreed by the Inland Revenue as not being subject to tax

j) Royalties and all other sources including entertainment and travel allowances

4. OUTGOINGS

- a) Enter income tax and tax on unearned income **TOGETHER**
- c) Enter payments to pension schemes
- d) Enter capital as well as interest payment on a mortgage for the main residence
- e) Only complete this if repayment is effected by a full Endowment Policy
- j) Bank overdraft and other loan charges (please state the purpose of the loan)

5. PARENTS' / APPLICANTS' CAPITAL ASSETS

The following will be taken in to account:

- a) Monies held on deposit at any bank or building society. The value of investments in stocks and shares at the time of application.
- c) The current market value of the main residence (please estimate)
- d) The current market value of any other properties (please estimate)
- f) If you run your own business or are partners in a business, then you should show the total net worth of the business. Shares in a company not listed on the Stock Exchange should be valued at your share of the net value of the company.

6. PARENTS' / APPLICANTS' CAPITAL LIABILITIES

Please detail all other monies owed, together with the lender's name on a separate sheet if necessary

7. 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
 - (iv) If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year
 - (v) If the child is in receipt of financial assistance from any other family members or income from a Trust Deed please declare the annual amount available
- i) Please enter the gross amount of any interest / share dividends received by the child

8. OTHER DEPENDENTS

Please provide details of any Carer's Allowance received and details of any other dependents, for example age, address, and condition

9. ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet 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.

Please contact the school with any queries you have about completing the form. Please note that the school must ensure that applications are received by I trust no later than 15 January, home visits for shortlisted applicants will take place in early February and schools will notify families of the decisions of the charity by late March

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