



KING'S COLLEGE SCHOOL
WIMBLEDON

Southside Wimbledon Common London SW19 4TT

Registered Charity No. 310024

CONFIDENTIAL WHEN COMPLETED

STATEMENT OF
FINANCIAL CIRCUMSTANCES
IN SUPPORT OF AN
APPLICATION FOR A BURSARY

If you have any queries, or would like assistance in completing your application, please contact Mrs Astrid Spencer on 020 8255 5435.

**Please return the completed form with photocopied documentation to:
The Bursar, King's College School, Southside, Wimbledon Common, London SW19 4TT.**

**We shall acknowledge your application by email within two weeks of receipt.
If you have not received an e-mail please contact the Bursar's office to ensure that we have received your application.**

BURSARY ADMINISTRATION LTD

The school now uses Bursary Administration Ltd to assist with the bursary assessment process. This may include a home visit and in this case a representative from Bursary Administration or the school will contact you to make an appointment.

BURSARY TERMS AND CONDITIONS

1. **Grant of bursary.** A bursary is granted at the sole discretion of King's College School.
2. **Obligations of the pupil.** The pupil who is subject of a bursary is required to work hard, to continue to contribute positively to the life of the school, to be a credit to the school, and set a good example to other pupils. The pupil must adhere to the school's required standards of conduct and progress.
3. **Obligations of the parent(s).** The parent(s) are required to support and encourage the pupil, treat members of the school community reasonably, and comply with the school standard terms and conditions.
4. **Annual review.** All means-tested awards will be subject to annual review and parents shall each year be required to complete a financial means questionnaire. After any annual review, the school reserves the right to vary the value of the bursary with immediate effect and will confirm the new value in writing to the parents.
5. **Withdrawal of the bursary.** The bursary may be withdrawn by written notice sent to a parent if, in the opinion of the governors acting in good faith, the pupil or a parent has not complied with the obligations set out in paragraphs 2, 3 and 4 above or otherwise the pupil has fallen below the required standard of conduct and progress and in the further opinion of the governors there has been no significant improvement following consultation with a parent and/or the pupil and a written warning. Withdrawal of the bursary shall take effect from the start of the following term.

Further the bursary may be withdrawn by written notice if the balance of the account remains unpaid 28 days after a written reminder has been sent to the parents.
6. **Repayment of the bursary.** The parent(s) will be required to repay all or part of the bursary if it is terminated in the following circumstances:
 - a. If parents have knowingly or recklessly provided false or inaccurate information about their financial position.
 - b. If the pupil has been found to have committed a serious breach, or series of persistent minor breaches, of discipline for which the sanction would normally be expulsion or required removal, up to three terms benefits may be repayable.
7. **Fees in lieu of notice.** For the avoidance of doubt, the benefits payable under the bursary do not apply to any term for which the school has required payment of fees in lieu of notice.
8. **Conditions of the bursary.** These conditions take precedence over any of the school's standard terms and conditions which are inconsistent with them but in all other respects the school's terms and conditions as amended from time to time shall apply and these bursary conditions shall be interpreted with them.

NOTES FOR PARENTS ON COMPLETING A BURSARY APPLICATION

DECLARATION CONCERNING VALIDITY OF INFORMATION

Parents are reminded that if false information is knowingly or recklessly provided in any particular, the School may withdraw the bursary award and seek to recover any benefits received under the award.

Bursaries are subject to certain conditions (see back page), and a parent's acceptance of the bursary is taken as acceptance of these conditions.

PARENTS

The persons about whom details should be given on the form are as follows:

- the natural father and mother of the child; or
- the parent of the child with whom the child resides and the spouse of that parent where the spouse normally resides with that parent and the child in the same household; or
- the child's legal guardian and the spouse of that guardian where the spouse normally resides with that guardian.

Where parents are divorced the natural parents of the child **are** expected to make a joint application wherever possible.

Separate forms can be issued on request by reason of confidentiality.

FINANCIAL CIRCUMSTANCES AND CAPITAL STATEMENT

These sections must be completed in full. Enter nil if applicable but **do not leave any boxes blank.**

Income, expenditure and capital valuations should be as at the date the form is signed.

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. The amount to be declared should include any amounts received as profit related pay or by virtue of a salary surrender scheme.

Parents should declare the gross amount of all income received by children who are wholly or mainly dependent on them, excluding only sums earned from part-time employment and sums received as scholarships or student awards.

VERIFICATION

Parents must provide **copies** of documentary evidence as requested on the check list enclosed.

Failure to provide adequate evidence may result in the School being unable to process your application.

DEADLINE

The form should be completed fully and returned with **all** documentation (photocopied) by the due date. The school will not be able to consider late or incomplete applications.

FEES IN LIEU OF NOTICE

The benefits payable under an award do not apply to any term for which the School has required payment of fees in lieu of notice.

PERSONAL DETAILS

For office use

CHILD

Full name:

Date of birth:

Year of entry:

PARENTS

Parent 1

Parent 2

Names:

Style or title:

Address/es:

Daytime tel. no.:

Home tel.no.: (if different)

e-mail address/es:

Occupation/s:

Are you a company director?

YES NO

YES NO

If yes, please provide details
of shareholdings:

%

%

FOR INFORMATION ONLY
PLEASE CONTACT
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APPLICATION FORM

CAPITAL STATEMENT AT

/	/
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For office use

ASSETS

(Current market value)

Parent 1

Parent 2

£

£

House/Property:
(principal residence)

Other houses/properties:
(give details at bottom of section)

Car/s:

Possessions: *(including contents
of house & personal items)*

Interests in trusts:

Building society deposits:

Cash in bank:

Endowment Life Assurance policies:
(giving date of maturity)

Investments: *(give details below)*

Other assets: *(give details
value of business etc.)*

TOTAL ASSETS =

Address/es of other
houses/properties:

LIABILITIES

Mortgage/s:

Bank overdraft:

Credit card liabilities:

Other borrowings:
(give details)

TOTAL LIABILITIES =

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FINANCIAL CIRCUMSTANCES

For office use

ANNUAL INCOME

(All income is to be stated gross)

Parent 1

£

Parent 2

£

Salary:

Pensions:

Benefits in kind provided free
by reason of employment:

Gratuities or lump sum payments:

Business income:

Investment income:

Trust income:

Capital gains:

Building society, bank & other interest:

Net rental income:

Maintenance & alimony:

Any other income:

TOTAL GROSS INCOME =

TAXATION

Tax on income:

Tax on capital gains:

National Insurance:

**TOTAL TAX/
NATIONAL INSURANCE =**

**GOVERNMENT ASSISTANCE,
CHILD BENEFIT, WORKING
FAMILY TAX CREDITS,
OTHER - please detail**

(including value of board and/or
residence or other non-taxable
benefits provided free by reason
of employment.)

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ANNUAL EXPENDITURE

Parent 1

Parent 2

For office use

£

£

Rent:

Mortgage - capital:

Mortgage - interest:

Council Tax:

Water rates:

Gas & electricity:

Household:

Food:

Clothing:

Telephone/broadband:

TV:

Medical:

Other:

Vehicle running costs:

Maintenance & alimony:

Pension contribution:

Loan repayments:
(other than mortgage)

Personal expenditure:
(if not already provided)

Other:

TOTAL EXPENDITURE =

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DEPENDENT CHILDREN

For office use

Please include the child to whom this application refers; if you have more than 4 children, please give details on a separate sheet.

	1	2	3	4
Forename:				
Date of birth:				
Sex:				
Name of school/college attended:				
Type (boarding/day):				
	£	£	£	£

Annual school or other educational fees:

(excluding extras & sundry disbursements but before allowances detailed below)

Compulsory additional school charges:				
Tutoring & music lessons:				

Amount of fees shown above covered by:

Scholarships, bursaries or allowances given by school/college:

Assistance from any other source:

eg grandparents, trusts, employers, settlements etc (Please specify)

Annual income of child:

(include trust income, interest received etc)

Childcare costs:

(please detail)

OTHER DEPENDENTS

DOCUMENTATION CHECKLIST

To ensure your application is complete, please enclose documentation that supports your completed application form. This checklist is an indication of the documentation we require, it is not a definitive list.

Please indicate whether the following items are enclosed or not-applicable to your circumstances. Please telephone for guidance if necessary.

Documents should be **copies** and originals should be made available upon request. All applications that are not progressed will be destroyed along with the documentation provided.

Enclosed **Not
Applicable**

ASSETS

Recent house valuation *(if made personally please state how)*

Valuation of second house *(if made personally please state how)*

Investments *(please show the valuation of each investment separately)*

Last three months bank statements for all bank accounts including business accounts

Building society passbooks or statements

Other *(please specify)*

LIABILITIES

Loan agreements

All credit card statements for the last three months

Enclosed Not
 Applicable

INCOME (All sources of income must be supported by documentation).

Last available HMRC self-assessment return (unabridged) and HMRC tax calculation.
(The tax calculation may be forwarded as soon as it is available. If the last available self-assessment return is not that of the previous tax year, you are asked to provide a copy of that return as soon as it is available.)

Latest payslip

March payslip

P60

P45

PIID

Notification of tax coding

For shareholder directors of private limited companies, a copy of the latest available accounts

Pension pay advice

Copy of the latest trading accounts

Documentation of trust income

Details of capital gains if not included on your self assessment return

Dividend certificates

Statement of interest received or building society passbook

Statement of untaxed interest

Rent book or other documentation for rents received other than those included on your tax return
(i.e. received under rent a room allowance).

Statement of government assistance

Other *(please specify)*

Enclosed Not
 Applicable

EXPENDITURE

Mortgage statement

Rent book

Court orders & legal separation agreements

Council Tax valuation

Breakdown of personal expenditure if not already provided

Other documentation

WHAT LEVEL OF SUPPORT ARE YOU REQUESTING?

Please tell us how much you feel you could pay towards the fees and what steps you have taken to maximise your income and reduce your outgoings to achieve this.

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PLEASE CUT OUT AND KEEP FOR YOUR RECORDS



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Date returned to King's College School:
