# SJCR logo A4

# **IN CONFIDENCE**

## APPLICATION FOR FINANCIAL ASSISTANCE

NOTE: *Applicants are obliged to complete this document truthfully and will be required to provide evidence to support the financial information given. Please read the notes on page 3, and complete the document in full.*

### **1. CHILD IN RESPECT OF WHOM FINANCIAL ASSISTANCE IS SOUGHT**

Full names:

Date of Birth: Actual/proposed date of entry to St Joseph’s ,

### **2. PARENTS** Father/Step-father Mother/Step-mother

Title: . .

Name:

Address: .

 .

Post Code:

Phone number Home: .

 Work:

Occupation:

Marital Status: . .

### **3. DEPENDENT CHILDREN**

Please give details of all dependent children (whether wholly or partly dependent on you), including the child to whom the application refers:

 1 2 3 4

Name:

Date of birth:

Sex:

Present school/ l)

university:

Current school year

Is financial assistance

being received?

If yes, amount per term

% of full fees. …… …… …… ……

Date due to leave: …… …… …… ……

### **4. NOTES FOR GUIDANCE FOR COMPLETION OF APPLICATION**

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. All financial values should be shown in Sterling.

You should include photocopies of evidence of your income. This should normally be a tax return, in the absence of which a P60 or other appropriate document will be accepted. However, the return of the form should not be delayed on account of producing this evidence: if it is not yet available for the period concerned, the photocopies may be submitted separately. The College reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

**PARENTS/APPLICANTS (Paragraph 2)**

These are defined as:

* the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
* the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
* the child’s guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
* the person with whom the child resides in accordance with either a subsisting residence order made under section 8 of the Children Act 1989; or any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
* where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person’s partner (if any) where the partner normally resides with that person and the pupil in the same household.
* If parents are separated or divorced before or while their child attends the College, both mother and father will require to complete and sign the Application Form. If necessary, separate forms may be completed by each parent.

**STATEMENT OF CIRCUMSTANCES (Paragraph 5)**

State the circumstances giving rise to this request, continuing onto a separate sheet if necessary, including an indication of the amount of support requested, and the expected duration of that need for support. If there have been significant changes in circumstances, or are expected to be, these should be noted on page 3.

**INCOME**

**All figures should be for a full year**, and should be for the current or latest financial year.

Include the gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc). Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) – at the amount agreed for taxable purposes.

Profits from a business or profession should be included under business income – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.

All other Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.

All social security benefits received should be declared and type of benefit specified.

Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC.

Any non-taxable income should be entered in box D, and its source identified either on the form or separately.

**EXPENDITURE**

**All figures should be for a full year**, and should be for the current or latest financial year.

The figure included for ‘Rent/mortgage’ should include interest, capital and related endowment costs. Include bank overdraft and other loan charges incurred during the year under ‘Other’, specifying the purpose of the loan.

The actual amount of school fees paid in the period concerned should be entered under ‘School fees’. Contributions towards fees, from all sources (e.g. insurance policies for school fees, trusts, settlements, Grandparents or other family members) are to be included on page 2 under ‘Other income’.

### **5. STATEMENT OF CIRCUMSTANCES NECESSITATING THIS APPLICATION**

### (Please give full details as to the reason for your application)

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### How much funding do you require **per term** ? State as a percentage of full fees **or** as an amount

### . % of full fees **OR** ….. Amount in £’s

### How long will you require the funding? (Please give an estimate) State number of terms **or** number of years

### ….. Terms **OR**  . Years

### **6. FINANCIAL CIRCUMSTANCES**

Income and expenditure for a **FULL TAX YEAR** ending: 5th April …..

#### INCOME

Salary

Pensions

Benefits in kind

(as assessed for tax)

Business income

Investment/Trust income

Capital gains

Building society interest

Untaxed interest

Property income

Maintenance & alimony

Benefits
(including Child Benefit)

Any other income

 Father/Step-father

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A. TOTAL GROSS INCOME

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#### TAXATION

Tax on income

Tax on capital gains

National Insurance

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B. TOTAL TAX/NATIONAL INSURANCE

C. INCOME AFTER TAX (A – B)

D. ANY NON-TAXABLE INCOME NOT ALREADY INCLUDED IN A.

E. FINAL INCOME (C + D)

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#### PER YEAR

#### EXPENDITURE

Rent/mortgage

(delete as applicable)

Council tax

Water

Electricity/gas/oil

Motoring expenses

Child maintenance
and alimony

School fees

Debt repayments

(Give details below)

Pension contribution

House keeping

Personal expenditure

Other

(Give details below)

Father/

Step-father

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F. TOTAL EXPENDITURE

G. EXCESS OF INCOME OVER EXPENDITURE (E - F)

Debt repayment (Give details)

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Other Expenditure (Give details)

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Please detail any significant changes in circumstances in the last year:

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Please detail any significant changes expected during the next two years:

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### **7. NOTES FOR GUIDANCE FOR COMPLETION (Continued)**

### **ASSETS AND LIABILITIES (Paragraph 8)**

Assets should be included at current market values, which you should estimate.

If you run your own business or are partners in a business, then you should show the net worth of the business.

In the case of second homes and/or other properties, these should be included under ‘Investments’, at their estimated current market value.

A mortgage on your primary home should be recorded under ‘Mortgages’, any mortgages on additional properties being itemised separately.

**ANY OTHER RELEVANT INFORMATION**

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant that have not already been included.

### **8. STATEMENT OF CAPITAL**

As at 5 April ….. *Give current estimated market values for all assets*

#### ASSETS

House

Cars, boats etc

Investments

Interests in trusts

Building society deposits

Cash in bank (including deposits)

Life assurance endowment polices (Please give maturity dates)

Other assets

 Father/

Step-father

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H. TOTAL ASSETS

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#### LIABILITIES

Mortgages

Bank overdraft

Other borrowings

(give details)

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I. TOTAL LIABILITIES

J. NET WORTH (H - I)

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I declare that I have checked this form and to the best of my knowledge all information provided is true and correctly represents the facts relevant to this application.

Signed: …… Date: ……

 Father/Step-father

Signed: …… Date: ……

 Mother/Step-mother

Completed application to be sent under Confidential cover for attention of: The Bursar, St. Joseph’s College, Upper Redlands Road, Reading, Berkshire RG1 5JT.

### FOR INTERNAL USE ONLY

BURSARS OFFICE TO COMPLETE

Please provide information to support this application

Date application received……….……………………………………………………………………….

Applicant payment history ……………………………………………………………………………….

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### HEAD TO COMPLETE

Please confirm student’s academic performance (include a recommendation for the Governors).

### ……………………….……….…………………………………….…………………………………….

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