



# Wakefield Grammar School Foundation

**CONFIDENTIAL**

## STATEMENT OF FINANCIAL CIRCUMSTANCES IN SUPPORT OF AN APPLICATION FOR A FOUNDATION AWARD

*This questionnaire is in the form recommended by the Independent Schools Bursars' Association*

**1. PUPIL**

- (a) Full Name .....
- (b) Date of Birth .....

**2. PARENTS**

*Father/Step-Father/Guardian    Mother/StepMother/Guardian*

- (a) Names .....  
 (b) Style or Title .....  
 (c) Address(es) .....  
 .....

Postcode .....

(d) Occupation .....

(e) Retired – Employed – Self Employed – Unemployed ?

(f) Name of Employer or Business .....

(g) Are you a Director or Proprietor of this Company or Business?

Yes/No

Yes/No

If YES state proportion of Business you and/or your spouse/partner own:-

.....

(h) Daytime Tel No .....

Evening Tel No .....

Mobile Tel No .....

**FOR SCHOOL USE ONLY**

### 3. INCOME

Please enter below your income from all sources for the tax year to April 2016.

	<b>Father/Step-Father/Guardian</b>	<b>Mother/Step-Mother/Guardian</b>
	£ per annum	£ per annum
(a) Gross Salary & other similar earning (including all taxable benefits and emoluments) .....	.....	.....
(b) Profits of business or profession .....	.....	.....
(c) Gross pension, widow's pension etc .....	.....	.....
(d) Gross investment income from		
(i) Building Societies/Banks .....	.....	.....
(ii) Dividends .....	.....	.....
(e) Gross income from Property .....	.....	.....
(f) Social Security benefits .....	.....	.....
(g) Tax Credits .....	.....	.....
(h) Separation or Maintenance Allowance.....	.....	.....
(i) Is there a Court Order/Separation Agreement? If yes, please state annual Amount payable for school fees .....	.....	.....
(j) Benefits in Kind .....	.....	.....

### 4. OUTGOINGS

(a) Tax payable on Incomes declared above (including tax deducted at source) .....	.....	.....
(b) National Insurance Contributions .....	.....	.....
(c) Superannuation Contributions .....	.....	.....
(d) Mortgage interest .....	.....	.....
(e) Endowment mortgage insurance .....	.....	.....
(f) Annual rent and/or Council Tax payable on home .....	.....	.....

**Please attach photocopies of P60s, March pay slips, Inland Revenue Tax Returns, Accounts, Mortgage Statements, etc. to verify the above information.**

### 5. CAPITAL ASSETS

(a) Approximate market value of all investments:		
Building Society/Bank deposits .....	.....	.....
Equity investments, Government stocks PEPs, ISAs, TESSA's .....	.....	.....
(b) Approximate market value of principal residence (freehold or leasehold) .....	.....	.....
(c) Approximate market value of other possessions including house contents, cars, etc .....	.....	.....
(d) Approximate market value of any other assets (please specify and include the market value of any Insurance Policies maturing this tax year or the last five years) .....	.....	.....

- (e) Net worth/value of any business which you own or share .....
- (f) Approximate market value of any other properties owned either at home or abroad .....
- (g) Redundancy, employment separation or lump sum payments .....

**6. CAPITAL LIABILITIES**

*Please give details of any capital charges against the assets declared in Section 5.*

- (a) Mortgage - amount outstanding on house .....
- (b) Other liabilities .....

**7. DEPENDENT CHILDREN** *(include the child to whom this application refers: if more than 4 children please give details on a separate sheet)*

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
(a) Full Name: First Name	.....	.....	.....	.....
Surname	.....	.....	.....	.....
(b) Date of Birth	.....	.....	.....	.....
(c) Sex	.....	.....	.....	.....
(d) School/University/College	.....	.....	.....	.....
(e) Independent/State	.....	.....	.....	.....
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
(f) Annual school or educational fees (excluding extras and sundry disbursements)	.....	.....	.....	.....
(g) Compulsory additional school charges	.....	.....	.....	.....
(h) Scholarships, Bursaries or allowances given by the school	.....	.....	.....	.....
(i) Annual sum arising from capital repayment scheme	.....	.....	.....	.....
(j) Annual sum arising from Educational Insurance Policies	.....	.....	.....	.....
(k) Assistance from any other sources eg grandparents', Trusts, settlements etc.	.....	.....	.....	.....
(l) Annual Income of child (if any)	.....	.....	.....	.....

***The details requested with regard to the fees payable on behalf of your other children are for information only and will not be taken into account in the assessment of the level of bursary awarded.***

**8. OTHER DEPENDENTS** *(Please give details)*

**9. ANY OTHER RELEVANT INFORMATION** *(Continue on separate sheet if necessary)*

**10. DECLARATION**

*We/I have made a complete and accurate declaration of our/my income and assets and my/our financial situation and circumstances generally.*

*We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for him/her at the school, the following terms and conditions will apply as between ourselves/myself and the School:-*

- a) our/my child’s fees account with the School will be credited termly with the amount of the Bursary for so long as the award remains in effect:*
- b) Any award of a Bursary is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated:*
- c) we/I will report immediately any material change in the financial position declared;*
- d) the Bursary may be withdrawn or reduced if:*
  - (i) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated:*
  - (ii) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances:*
  - (iii) there is a material change in our/my financial circumstances:*
  - (iv) the School’s resources are insufficient to maintain the level of award.*
- e) the Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child’s fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary.*

**Signature.....Father/Step-Father/Guardian Date.....**

**Signature.....Mother/Step-Mother/Guardian Date.....**

**Note: It is vital that if the above declaration is not signed by both parents, the reason why must be stated:**

*Each person with parental responsibility for the child is required to sign this form and Wakefield Grammar School Foundation is entitled to treat any information received from any person who has signed this form as having been on behalf of both or all such persons.*

**11. ASSISTANCE FROM OTHER SOURCES**

**In order to help the greatest number of parents who need financial assistance, all those who apply for a Foundation Award are asked first to enquire if they are eligible for assistance from other sources.**

- (a) Have you applied to other Trusts or Foundations for a grant? Yes/No
- (b) If so, give details and the result.

**Please Note this is not an Application Form to sit the entrance examination. Please contact the Admissions Secretary at the respective school.**

**This form must be returned to the Governors’ Office at the address below as soon as possible and NO LATER THAN FRIDAY 25 NOVEMBER 2016. Failure to do so may affect your opportunity to be considered for a Foundation Award.**

**The Finance Administrator, Wakefield Grammar School Foundation, Governors’ Office, Green House, 158 Northgate, Wakefield, WF1 3UF**