



FINANCIAL QUESTIONNAIRE 2015/16

Deadline for application

Completed applications for fee assistance for the 2015/16 school year, together with all supporting evidence by 20th March 2015

The principle of last resort

We offer fee assistance on the principle that it is the last resort for funding of school fees. Applicants must consider all other possible sources of funding before turning to the school.

Priority expectations

It is expected that, after housing, utility and food and clothing costs, the cost of school fees is given priority in your family budget. We expect that they are prioritised over cost of holidays, out of school activities and purchase of other items.

Fee assistance budget

We have a limited budget for fee assistance. Priority for assistance will be given to staff then current recipients of fee assistance, then to other families already in the school, then to new applicants. **However, applications received after our stated deadlines will lose any priority status.**

State benefits

It is a requirement of our fee assistance programme that you must apply for all state benefits to which you are entitled before seeking fee assistance. If you are unable to provide complete evidence of the state benefits you receive, the school will use its own calculation of your entitlement in place of your figures.

Fee assistance at St Paul Steiner School is subject to the following conditions:

- Payment of fees is by ten equal monthly direct debits with the first payment being in our account by 1st September
- All prior debts to the school are either repaid or subject to an agreed repayment plan.

Please supply **photocopies** of any documents you provide.

Originals will not be returned and we cannot copy originals on your behalf.

Name of non-resident parent: (where applicable)	Phone no:
Contact address of non-resident parent:	
Postcode:	
Email:	

St Paul's expects applications for community subsidy to be submitted by both resident and non-resident parents. If this is not the case the resident parents must be seen to have used all possible endeavours to obtain a contribution to school fees and living costs from the absent parent.

Will both parents be submitting an application?

If you answered yes to that last question go to **

If you NO, when did you last have contact with your ex-partner?

When did your child last have contact with you ex-partner?

MAINTENANCE INCOME - if you are **separated** from your child/ren's other parent.

Do you receive any of the following from you ex-partner?	Amount per year
A contribution to school fees	£
Maintenance Income to cover living costs	£

Are you satisfied that your ex-partner is making reasonable overall contribution to the costs you incur in relation to your child or children?

If no, have you attempted to enforce payment of maintenance? Please give details.

SECTION B - ANNUAL INCOME

	First Parent	Second Parent	Documents required
Gross annual income from Employment			P60 for last tax year and last payslip
Gross annual income from Self-Employment			Business accounts and tax return for last two years
Income from your own company Complete this is if you own 25% or more of a company or LLP – give average total for last 2 years for salary, dividend income and any other cash drawings			Financial accounts and full tax return for last two years.
Child Benefit			Copy of award notice
Child Tax Credit			Copy of award notice
Working Tax Credit			Copy of award notice
Housing Benefit			Copy of award notice
Income Support			Copy of award notice
Job seekers allowance			Copy of award notice
Child care element WTC or employee scheme			Copy of award notice
Widow/ers Benefit			Copy of award notice
Other state benefit			Copy of award notice
Income from lodgers			
Any sum over £200 in total that you receive from trusts, friends or family. Including payment of school fees.			
Any other income including investment, pension etc			
Any sum over £200 in aggregate that you receive from friends or family. Including payment of school fees.			
Any sum over £200 in aggregate that you receive from friends or family. Including payment of school fees.			
Maintenance agreements			
Other (please specify)			
TOTALS	(a)	(b)	
TOTAL INCOME	(a)+(b)=		

SECTION C ANNUAL EXPENDITURE

	First Parent	Second Parent	Documents Required
Tax and NI payable			P60 or tax return Or copy of tax return for last tax year.
Mortgage capital payment last 12 months *			Last Annual statement
Mortgage interest payment for last 12 months *			Last Annual statement
Annual Rent			Rental Agreement
House maintenance			
Council Tax			Latest advice note
Household, food, clothes			Copy bank statements for last three months
Heating			Bill for last month
Childcare costs for you to work			
Lighting			Bill for last month
Water rates			Annual Bill
Telephone			Contract
House insurance			Invoice for premium
Travel to work			
Motor tax			
Insurance			Copy of invoice
Petrol			
Repairs			
Holidays			
Other (please specify)			
TOTALS	(c)	(d)	
TOTAL EXPENDITURE	(c) + (d)=		

SECTION D Assets and other

Value of Savings	
Make, model and value of car(s)	
Current Value of House*	
Mortgage outstanding	
Do you own more than one property? If yes, Supply details indicated by * above	

Holiday/travel destination(s) for last two years	
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All requests for community subsidy must be made on behalf of two adults who jointly and severally take responsibility for payment of fees. If not named above:

Guarantor's Name

Address

Home Tel

Work Tel

SECTION E Community Subsidy Proposal

Full Fees Due (from page 1)	
Community subsidy requested	
Proposed financial contribution	
Work contribution proposed	

The above information is, to the best of our knowledge correct, and accurately reflects my/our financial situation, at the date of this application. We understand that the provision of false or misleading information, or deliberately withholding information relevant to this application, will lead to any concession being withdrawn, and possible criminal prosecution. I/we undertake to inform the school immediately, in writing, of any material change of financial circumstances, as detailed above, which could affect entitlement to community subsidy for the year in question.

Print Name parent/guardian 1

Signature

Date

Print Name parent/guardian 2 or guarantor

Signature

Date

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