



Part 2: Application form for financial assistance for the school year 2019-2020

Please return your form by Friday 14th December 2018

Please read the notes in Part 1 carefully and then fill in the form in block capitals. You must fill in **all** sections of the form. Please fill in the checklist in section N to confirm which documents you are providing to support your application.

A. Student's information

Surname:

First name (or names):

Date of birth:

Year group the student will be in when they start at the School:

Student's current address:

Father's address (if different):

Mother's address (if different):

Tell us about the person (or people) filling in this form.

Relationship to the student:	Father <input type="checkbox"/>	Stepfather <input type="checkbox"/>	Mother <input type="checkbox"/>	Stepmother <input type="checkbox"/>
	Carer <input type="checkbox"/>	Parent's partner <input type="checkbox"/>	Carer <input type="checkbox"/>	Parent's partner <input type="checkbox"/>
Name:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Work phone number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home phone number:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email address:	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please tell us the status of the child's parents' relationship (married, divorced, separated, partners, living together, widowed and so on) below.

B. Schools your child has attended in the past

Please give details of all the schools your child has attended in the past. Please tell us the type of school and any fees you have paid for the school year 2018-2019, with details of the percentage of any financial assistance or scholarship received.

C. Parents' details

Father, stepfather, carer, partner

Mother, stepmother, carer, partner

Occupation:

Employment status (please select):

Employed full-time	<input type="checkbox"/>	Employed part-time	<input type="checkbox"/>
Self-employed	<input type="checkbox"/>	Unemployed	<input type="checkbox"/>
Retired	<input type="checkbox"/>	Student	<input type="checkbox"/>

Employed full-time	<input type="checkbox"/>	Employed part-time	<input type="checkbox"/>
Self-employed	<input type="checkbox"/>	Unemployed	<input type="checkbox"/>
Retired	<input type="checkbox"/>	Student	<input type="checkbox"/>

Date of birth:

Name and address of employer or business:

If the employer is a limited company, please state:
- whether you are a director; and
- the percentage of shares you hold (if any):

If either parent is currently not in work, please explain whether this is likely to change in the near future.

D. Court orders and separation agreements for school fees

Please tell us any amounts to be paid for the school year 2019-2020 under a court order or separation agreement (if this applies).

£

E. Insurance policies for school fees

Please tell us the name of the insurance company (if this applies).

Please tell us how much the policy will pay for the school year 2019-2020.

£

F. Dependent children

In this section please give details for all children up to the age of 18 (or 21 if in full-time education) who are completely or mainly financially dependent on you. Include the child the application relates to.

Child 1 (who this application relates to)

Full name:			
Sex:	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth:	
Name of school, college or university they attend:		School type (please select):	<input type="checkbox"/> Maintained <input type="checkbox"/> Independent
Fees (if this applies):	£	Bursary award (if this applies):	%
Assistance from other sources (for example, relatives, educational allowances from employer, trusts and so on):	£	Value of trust for child (if this applies):	£

Child 2

Full name:			
Sex:	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth:	
Name of school, college or university they attend:		School type (please select):	<input type="checkbox"/> Maintained <input type="checkbox"/> Independent
Fees (if this applies):	£	Bursary award (if this applies):	%
Assistance from other sources (for example, relatives, educational allowances from employer, trusts and so on):	£	Value of trust for child (if this applies):	£

Child 3

Full name:			
Sex:	<input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth:	
Name of school, college or university they attend:		School type (please select):	<input type="checkbox"/> Maintained <input type="checkbox"/> Independent
Fees (if this applies):	£	Bursary award (if this applies):	%
Assistance from other sources (for example, relatives, educational allowances from employer, trusts and so on):	£	Value of trust for child (if this applies):	£

G. Parents' income

Please fill in the table below giving gross income (before tax and other deductions) from all sources, for the tax year 2018/2019. Tell us the actual amounts in whole pounds or write 'nil' as appropriate. If you do not know the actual amounts, please provide estimates. If you do this, next to the figure, write 'estimate' and the date you expect to know the actual amount. You must provide documents as evidence of all income you declare on this form.

	Father, stepfather, carer, partner	Mother, stepmother, carer, partner	Tick evidence supplied ✓
Earned income			
Salary	£	£	P60, tax return and latest payslip

Benefits in kind	£	£	P11D or tax return	
Bonuses received in the year	£	£	P60, tax return and payslip	
Profit (before tax) of owned business or company	£	£	Tax return and annual accounts	
Pension income	£	£	P60, payslip or tax return	
Total of state benefits Enter the yearly total from section H (marked with *)	£	£	HMRC and DWP letter	
Property income Enter the yearly rent income from section J (marked with **)	£	£	Signed tenancy agreement	
Building society and bank interest received	£	£	Bank statements covering three months	
Other investment income	£	£	Valid supporting documents	
Separation or maintenance allowance	£	£	Copy of the court order or separation agreement	
Any other income, tips or lump-sum payments not included above	£	£	Valid supporting documents	
Any other assistance you receive towards household spending (for example contributions from relatives)	£	£	Valid supporting documents	
Yearly total 2018/2019	£	£		

H. State benefits

Are you currently receiving any of the following benefits listed below? If so, please tell us the amount you receive each year. Please also make sure that you **provide documents as evidence of all** benefits you receive. Evidence includes letters or statements from HMRC or the Department for Work and Pensions (DWP).

		Tick evidence supplied ✓
Child Benefit	£	
Universal Credit	£	
Income Support or income-based Jobseeker's Allowance	£	
Contribution-based Jobseeker's Allowance	£	

Working Tax Credit	£	
Child Tax Credit	£	
Widowed Parent's Allowance	£	
Carer's Allowance	£	
Disability Living Allowance	£	
Incapacity Benefit	£	
Housing Benefit	£	
Council tax exemption	£	
Please list any other benefits below.		
	£	
	£	
	£	
	£	
* Yearly total for all benefits (also write this figure in section G under 'Total of state benefits')		£

I. Parents' household spending

Please fill in the table below giving details of total **yearly** spending for the tax year 2018/2019. Please write amounts in whole pounds or write 'nil' as appropriate.

	Father, stepfather, carer, partner	Mother, stepmother, carer, partner	Tick evidence supplied ✓
Tax paid on earned and unearned income declared in section G.	£	£	P60, tax return or payslip
National Insurance contributions	£	£	P60, tax return or payslip
Pension contributions	£	£	Payslip or tax return

Mortgage interest if you own your main home	£	£	Current mortgage statement	
Mortgage capital payments on your main home	£	£	Current mortgage statement	
Rent on your main home or any other properties	£	£	Tenancy or rental agreement	
Council tax	£	£	Council tax statement	
Credit-card or loan repayments	£	£	Letter and statements	
Personal insurance (for example, medical)	£	£	Annual statement	
Any maintenance payments made	£	£	Copy of the court order, separation agreement or letter from CSA	
Yearly total for 2018/2019	£	£		

J. Property details

Your main home

Do you own or rent your main home?	Own <input type="checkbox"/> Rent <input type="checkbox"/>	Tick evidence supplied ✓	
Estimated value (if owned)	£	Mortgage statement or rental agreement	
Outstanding balance on mortgage (if owned)	£	Current mortgage statement	
Final payment date	£	Current mortgage statement	

Other property or properties you own (or partly own) which are not your main home (include properties in the UK and abroad)

Number of properties owned or partly owned (if more than one, please use a separate sheet of paper to provide the information we ask for below for all properties)			
Estimated value	£		
Outstanding balance on mortgage (if any)	£	Mortgage statements	
Yearly council tax (if not paid by any tenants)	£	Annual council tax statement	
** Yearly rent income each year (also write this figure in section G 'Property income')	£	Rental agreement	

Yearly mortgage repayments (if any)	<input type="text" value="£"/>	Current mortgage statement	<input type="checkbox"/>
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K. Other assets

Cash in the bank (all accounts both in the UK and abroad)	<input type="text" value="£"/>	Statements covering three months	<input type="checkbox"/>
Estimated value of any investments	<input type="text" value="£"/>	Valid statements	<input type="checkbox"/>
Make, model and year of all motor vehicles	<input type="text"/>		
Estimated value of all motor vehicles	<input type="text" value="£"/>		
Estimated value of any other assets	<input type="text" value="£"/>		
Net worth of a business which you own or share	<input type="text" value="£"/>	Year-end accounts	<input type="checkbox"/>
Cash held anywhere, for any reason	<input type="text" value="£"/>	Valid statements	<input type="checkbox"/>
Value of any lump-sum or redundancy payments received in the past 18 months	<input type="text" value="£"/>	Letter from employer	<input type="checkbox"/>

Please tell us below why you can't use the value of your assets to pay the School fees.

L. Liabilities

Credit-card balances	<input type="text" value="£"/>	Statements covering three months	<input type="checkbox"/>
Loan balances	<input type="text" value="£"/>	Statements	<input type="checkbox"/>

If there are any other liabilities or commitments which you feel we should take into account, please provide details below.

M. Extra information

Please provide any extra information which may affect our assessment of your application for financial assistance (for example, significant changes in income or outgoings for the coming year, such as planned retirement). Continue on a separate sheet if necessary.

You should fill in this form and return it to the Financial Controller at the following address by 14th December 2018.

**The Financial Controller
 Cheadle Hulme School
 Claremont Road
 Cheadle Hulme
 Cheadle
 Cheshire SK8 6EF**

If we do not receive your form by the deadline stated above, we may not be able to assess your application or offer financial assistance.

Data protection

The information you provide is confidential and we will use it only to assess whether you are entitled to financial support to help you pay your tuition fees at our school. We will store it securely in the Finance Office (where you can inspect it as long as you give us at least 48 hours' notice). We will dispose of your application securely when we have finished with it.

We, Cheadle Hulme School, are a charitable company limited by guarantee registered in England at Claremont Road, Cheadle Hulme. Registered company number 03823129. Registered charity number 1077017.

N. Checklist

You must provide documents as evidence of all income, spending and assets you tell us about on this form. If the appropriate document is not available, instead of ticking the box please write the date when you will be able to produce it. Do not delay in returning your form. If you do not provide all the documents we ask for, this could delay our assessment of your application. **Please provide photocopies, not original documents.**

	Document provided Tick all that apply (✓) or write the date when you will provide the document	Office use only Evidence checked
Latest P60 and last three months' payslips	<input type="text"/>	<input type="checkbox"/>
P11D for benefits in kind	<input type="text"/>	<input type="checkbox"/>
HMRC self-assessment tax return	<input type="text"/>	<input type="checkbox"/>
End-of-year business accounts	<input type="text"/>	<input type="checkbox"/>
HMRC letters	<input type="text"/>	<input type="checkbox"/>
DWP letters	<input type="text"/>	<input type="checkbox"/>
Tenancy agreement (if renting)	<input type="text"/>	<input type="checkbox"/>
March pay advice or other confirmation of pension contributions in 2018/2019	<input type="text"/>	<input type="checkbox"/>
Bank or building society statements for all accounts covering three months	<input type="text"/>	<input type="checkbox"/>
Mortgage statements (for all properties)	<input type="text"/>	<input type="checkbox"/>
Annual council tax statement	<input type="text"/>	<input type="checkbox"/>

Benefits statements – for all benefits declared

Court orders or separation agreements

Annual statement of any personal insurance

Loan or credit-card statements covering three months

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/>

Other (please give details below)

We have the right to ask for any other documents we need as proof of the details you have provided.



Cheadle Hulme School

Declaration

Both parents or applicants should sign the following declaration.

I have read the notes and have made a complete and accurate declaration of my income and assets.

I understand that you will consider and may take into account information from all sources about my financial circumstances and affairs.

I understand you may visit my home to confirm my application details.

I understand and agree that you have the right to ask for any other documents as evidence of the income and asset figures I have provided on this form, and to make any enquiries you consider appropriate.

I accept that you may ask any credit reference agency for a reference while considering my application.

I understand and accept that you will make a decision on my application and that your decision is final.

I understand that if I am offered financial assistance for my child and accept a place for him or her at the school, the following terms and conditions will apply between me and the school.

- a) Each term, my child's fees account with the school will be credited with the amount of the financial assistance, for as long as the award remains in effect.
- b) Any award of financial assistance will be reviewed each year and may be increased or reduced according to changes in my financial circumstances. I must fill in a declaration of my financial circumstances each year on the form you send me, and I must provide all relevant supporting evidence by the return date shown on the form.

- c) I will tell you immediately about any significant change in the financial position I have declared on this form.
- d) I understand that the school will decide whether to provide financial assistance. Also, if financial assistance is provided, this may be withdrawn if the Head Teacher feels this is appropriate because of my child's attendance, progress or behaviour.
- e) The financial assistance will be withdrawn and I must repay any financial assistance I have already received if I have fraudulently, knowingly or recklessly provided false information in my application for financial assistance, or withheld or failed to reveal information which is relevant to my application.

Signatures: Each person with parental responsibility for the child must sign this form. We are entitled to treat any information we receive from any person who has signed this form as having been given on behalf of both applicants.

Father, stepfather, carer or partner

Signature: Date:

Mother, stepmother, carer or partner

Signature: Date: