



MAGDALEN COLLEGE SCHOOL, OXFORD

Financial Assistance with Fees

Means Testing Form in support of an application for a Bursary

CONFIDENTIAL UPON COMPLETION

Confidential Statement of Financial Circumstances

in support of an application for a Bursary

Please read the Notes for Guidance on pages 10 to 12 before completing this questionnaire

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

1. CHILD	
Full Names	
Date of Birth	
Term/Year of Entry	

2. PARENT CONTACT DETAILS (see note)

	Father/Step Father	Mother/Step Mother
Names		
Title		
Address		
Post Code		
Day time Tel		
Evening Tel		
Mobile		
Fax		
E Mail Address		

3. PARENTS' OCCUPATIONS

Father/Step Father:

Employed (insert employer's name, address and phone number)

Are you a Director or Shareholder or Proprietor of this Company?

Yes / No

Yes / No

If "YES" state proportion of Company or Business you own

Self-employed (complete type of business) / partner in partnership

If a partner, state your share of partnership income and capital, if any

Unemployed

Retired

Mother/Step Mother:

Employed (insert employer's name, address and phone number)

Are you a Director or Shareholder or Proprietor of this Company?

Yes / No

Yes / No

If "YES" state proportion of Company or Business you own

Self-employed (complete type of business) / partner in partnership

If a partner, state your share of partnership income and capital, if any

Unemployed

Retired

4. INCOME (see note)*(Please enter below your current earnings and expected income from all sources for this tax year)*

	Father/Step Father	Mother/Step Mother
Gross Salary and other emoluments (including all taxable benefits & expenses) for the year to 5 th April 20[]		
Taxable profits of trade or profession for last two tax years	(i). (ii).	(i). (ii).
Gross pension, widow's pension, State pension etc		
Gross investment income from:		
<ul style="list-style-type: none"> • Building Societies /Banks 		
<ul style="list-style-type: none"> • Dividends and interest (other securities) 		
Gross rental profit		
Social Security benefits (including Child Benefit and Child Tax Credits)		
Separation or Maintenance Allowance		
Is there a Court Order/Separation Agreement? If yes, please state annual amount payable for school fees.	Yes / No	Yes / No
Benefits in Kind provided free by reason of employment not already included in gross salary above		
Any other income or gains not included in any of the above e.g. trust or estate income, gains on sale of capital assets, surrenders or maturity of life assurance policies, royalties etc		
Please enclose a copy of your self assessment tax calculation for the previous year.		

5. OUTGOINGS (see note)		
	Father/Step Father	Mother/Step Mother
Tax payable on Incomes declared above <i>(including tax deducted at source)</i>	(i) (ii)	(i) (ii)
National Insurance Contributions		
Pension or superannuation contributions (net)	(i) (ii)	(i) (ii)
Mortgage repayments <i>(include capital repayment as well as interest)</i>	(i) Interest (ii) Capital	(i) Interest (ii) Capital
Endowment mortgage insurance		
Any other interest payable e.g. overdrafts, credit cards, loans, etc <i>(please specify)</i>		
Annual rent payable on principal residence		

6. CAPITAL ASSETS (see note)		
	Father/Step Father	Mother/Step Mother
Approximate market value of all investments:		
<ul style="list-style-type: none"> • Building Society/Bank deposits/National Savings accounts 		
<ul style="list-style-type: none"> • Equity investments (shares, unit trusts), Corporate bonds and other securities and Government stocks 		
<ul style="list-style-type: none"> • ISAs 		
<ul style="list-style-type: none"> • Life assurance bonds and policies including endowments 		
Approximate market value of principal residence (<i>freehold or leasehold</i>)		
Approximate market value of other possessions including house contents, car, collections, paintings, jewellery etc		
Cash at banks or elsewhere (<i>current accounts only</i>)		
Approximate market value of any other assets (<i>please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years</i>)		
Net worth/value of any businesses which you own or share		
Approximate market value of your interest in any other property, land or buildings either at home or abroad		
Redundancy or other termination payments		
Monies that are owed to you		
Other assets not listed e.g. share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc		

7. CAPITAL LIABILITIES (see note)		
	Father/Step Father	Mother/Step Mother
<i>(Please give details of any capital charges against the assets declared in Section 6)</i>		
Mortgage Details		
<ul style="list-style-type: none"> • amount outstanding on principal residence • 		
<ul style="list-style-type: none"> • a final payment date • 		
Other liabilities <i>(please specify)</i>		

8. NET ASSETS			
		Father/Step Father	Mother/Step Mother
	TOTAL ASSETS (6)		
	LIABILITIES (7)		
	NET ASSETS (6-7)		
	<i>Please explain any reasons why net assets cannot be converted or utilised to pay school fees.</i>		

9. DEPENDENT CHILDREN (see note) *(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)*

	1	2	3	4
Forename				
Date of Birth				
School or College				
Boarding or Day				
	£	£	£	£
Annual school or other educational fees <i>(excluding extras and sundry disbursements)</i>				
Compulsory additional school charges				
Amount of fees covered by:				
Scholarships, Bursaries or other allowances given by school				
Annual sum arising from capital repayment scheme				
Services/Diplomatic/ Company Education Allowances (gross)				
Annual sum arising from Educational Insurance Policies				
Assistance from any other sources e.g. Grandparents, trusts, charities, etc <i>(please specify)</i>				
Annual income of child <i>(if any)</i>				
Capital Value of Trust				

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

10. OTHER DEPENDENTS (please give details) (see note)

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11. VERIFICATION OF INCOME Please enclose documentary evidence in support of the income figures in Section 4. Please tick those you are enclosing:

P60 and P11D	Copy of HMRC tax calculation issued under Self Assessment
March Pay Advice	Confirmation of Schedule D self employment income from an independent accountant
Annual Report & Accounts (including Balance Sheet) for the years 20[] & 20[]	
Others (<i>please specify</i>)	e.g. copies of dividend vouchers, bank interest certificates
Court Orders and Legal Separation agreements	Covering the payment of school fees and child maintenance
Benefits received	Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living allowance, Incapacity Benefit, Child Benefit

12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing:

Property Valuation	£	Investment Portfolio Valuation	£
Mortgage Statement	£	Contents Insurance	£

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a Grant from the school are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result.

ANY ADDITIONAL INFORMATION

HOME VISIT

Please note that it is likely that a representative of the School will make a visit to discuss your application.

13. DECLARATION

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

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

We/I understand that if we/I are/am offered a Grant 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 Grant for so long as the award remains in effect;
- b) any award of a Grant 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 Grant may be withdrawn or reduced if:
 - i) we/I act or our/my child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our/my child at the school;
 - ii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iii) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
 - iv) in the opinion of the Head, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;
 - v) we/I are more than [28] days in arrears in respect of any amount due and owing to the School;
 - vi) there is a material change in our/my financial circumstances;
 - vii) the School's resources are insufficient to maintain the level of award.
- e) the Grant will be withdrawn and the value of any amount of the Grant 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 Grant.

Signatures: (See note on Parents/Applicants)

Parent/Guardian* Date

Parent/Guardian* Date

[NB. Each person with parental responsibility for the child is required to sign this form and the school 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]