



Magdalen College School, Oxford

**Financial Assistance with Fees:
Means Testing Form in Support of an Application for a
Financial Hardship Award**

September 2020 Michaelmas Term Only

CONFIDENTIAL WHEN COMPLETED

Confidential Statement of Financial Circumstances in support of an application for a Hardship Award

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

Please read the Notes for Guidance on pages 15 to 19 (Annex A) before completing this questionnaire.

You are required to complete this form in full not omitting any information. If any parts of the form are not relevant to your application, please put a line through the box and initial it rather than leave the section blank. Please insert 'nil' in the value box for nil values rather than leave the box blank.

It is important to provide documentary evidence to support your income, outgoings, assets and liabilities declared on this form. Details of the type of documentation required (but not limited to) are listed on pp.11-12.

When completed, please sign the declaration in Section 13, p.14 **and** the Home Visit Consent Declaration attached as Annex B, pp. 20-22.

The return of an incomplete form and/or missing documentation may delay or even invalidate your application for financial support. The completed and signed form with the required documents should be returned to the Bursar by the specified deadline. If you are able to scan and e-mail documents please e-mail to bursar@mcsoxford.org. If you are sending hard copies by post, please address to: The Bursar, Magdalen College School, Cowley Place, Oxford, OX4 1DZ. Please return your application by the specified deadline so that claims can be processed as quickly as possible.

Once completed the information in this document will be regarded as strictly confidential. It will be held securely and confidentially and will not be shared with any third parties other than Bursary Administration Limited, who may be employed by the School to undertake a home visit and review the information which is used to make this decision. (See Annex B). The School will retain your data in accordance with the School's Privacy Notice available on the MCS website.

1. CHILD	
Full Names	
Date of Birth	
Current Form	

2. PARENT CONTACT DETAILS <i>(see guidance notes)</i>		
	A. Father/Step Father	B. 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 job title, 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 / partner in partnership (state the name of the business and the nature of the work undertaken by the business)		
If a partner, state your share of partnership income and capital, if any		
Unemployed		
Retired		
Mother/Step Mother:		
Employed (insert job title, 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 / partner in partnership (state the name of the business and the nature of the work undertaken by the business)		
If a partner, state your share of partnership income and capital, if any		
Unemployed		
Retired		

4. DETAILS OF CHANGE(S) TO FINANCIAL CIRCUMSTANCES THAT HAVE PROMPTED AN APPLICATION FOR FINANCIAL SUPPORT *(see guidance notes)*

Please provide details of the recent and unexpected change(s) to your family circumstances that have impacted your financial position and potentially your commitment to continue to pay the school fees for your son/daughter. Please include any supporting documentation to verify this eg payslips, bank statements, correspondence from your employer, doctor, consultant or legal adviser. Please continue on the final page if necessary.

5. INCOME (see guidance notes)

(Please enter below your earnings, self-employed income, business income and rental income as appropriate for tax year or business year **2019 – 2020**; for all other sources of income, please use the expected value for the current tax year)

		Father/Step Father	Mother/Step Mother
a	Gross salary and other emoluments (including all taxable benefits & expenses) for the year to 5th April 2020		
b	Taxable business profits of trade or profession for last two tax years or gross self-employed earnings: (i) 2019 – 2020 and (ii) 2018 - 2019	(i) (ii)	(i) (ii)
c	Current gross salary and/or taxable business profit or gross self-employed earnings: (i) Monthly earned income prior to change in circumstances prompting this application for financial support (ii) Current monthly earned income in light of impact of current situation on earnings	(i) (ii)	(i) (ii)
d	Gross pension, widow's pension, State Pension etc for tax year to 5th April 2020		
e	Gross investment income for tax year 2019 – 2020 from:		
	<ul style="list-style-type: none"> • Building Societies /Banks / ISAs / Other (please specify) 		
	<ul style="list-style-type: none"> • Dividends and interest / Other securities (please specify) 		
f	Gross rental profit for the tax year to 5th April 2020		
g	Social security benefits, including: Child Benefit, Working Tax Credits and Child Tax Credits, Universal Credits etc (please specify)		
h	Separation Agreements, Maintenance Allowance, Consent Orders Is there a Separation Agreement, Maintenance Agreement or Consent Order in place?	Yes / No	Yes / No
i	If yes please state: <ul style="list-style-type: none"> • annual amount payable for school fees • annual amount payable for maintenance or support 		
j	Any other income or gains not included in any of the above		

6. OUTGOINGS <i>(see guidance notes)</i>		
	Father/Step Father	Mother/Step Mother
a	Tax payable on income declared in Sections 5a, 5b, 5d, 5e, 5f and 5g if applicable <i>(including tax deducted at source)</i> : (i) tax on earned income for tax year 2019 – 2020 (Sections 5a and 5b) (ii) tax on unearned income for tax year 2019 – 2020 (Sections 5d, 5e, 5f and 5g if applicable)	(i) (ii)
b	National Insurance Contributions on income declared in Sections 5a and 5b for tax year 2019 - 2020	
c	Superannuation contributions or pension contributions as applicable for tax year 2019 – 2020 <i>(net)</i> : (i) superannuation contributions (ii) pension contributions	(i) (ii)
d	Mortgage repayments <i>(include capital repayment as well as interest)</i> : (i) interest (ii) capital	(i) (ii)
e	Endowment mortgage insurance	
f	Any other interest payable e.g. overdrafts, credit cards, loans, etc <i>(please specify)</i>	
g	Annual rent payable on principal residence	
h	Change(s) to outgoings as a result of current circumstances. Please identify any changes to your outgoings that have arisen as a result of your recent change in circumstances and has prompted this application for financial support.	

7. CAPITAL ASSETS *(see guidance notes)*

	Father/Step Father	Mother/Step Mother
a	Approximate market value of all investments held in the UK or overseas:	
	<ul style="list-style-type: none"> • Building society/bank deposits/National Savings accounts/Premium Bonds/Other <i>(please specify)</i> 	
	<ul style="list-style-type: none"> • Equity investments (shares, unit trusts), corporate bonds and other securities and government stocks <i>(please specify)</i> 	
	<ul style="list-style-type: none"> • ISAs <i>(please specify type)</i> 	
	<ul style="list-style-type: none"> • Life assurance bonds and policies including endowments 	
b	Approximate market value of principal residence <i>(freehold or leasehold)</i>	
c	Approximate market value of other possessions including: valuable items listed separately on the household insurance policy, collections, paintings, jewellery etc and car(s) <i>(please specify)</i>	
d	Cash at banks or elsewhere <i>(current accounts only)</i>	
e	Approximate market value of any other assets <i>(for instance, please specify and include the market value of any insurance policies or annuities maturing in this tax year or the last five years; any lump sum pension drawn down this year or in the last two years and not re-invested in an annuity)</i>	
f	Net worth/value of any businesses which you own or share <i>(if own a share, please specify percentage owned)</i>	
g	Approximate market value of your interest in any other properties, land or buildings either at home or abroad	
h	Redundancy or other termination payments (such as a settlement agreement) received in the past three years or likely to receive in the next tax year	
i	Monies that are owed to you	
j	Other assets not listed e.g. share options, trust interests/assets held on your behalf by a third party, assets received in the foreseeable future etc	
k	Please explain any reason why your assets cannot be converted or utilised to pay school fees	

8. CAPITAL LIABILITIES <i>(see guidance notes)</i>		
	Father/Step Father	Mother/Step Mother
<i>(Please give details of any capital charges against the assets declared in Section 7)</i>		
a Mortgage Details		
<ul style="list-style-type: none"> • amount outstanding on principal residence • amount outstanding on other mortgaged properties held 		
<ul style="list-style-type: none"> • final payment date – principal residence • final payment date – other residence(s) 		
b Other liabilities (please specify eg loans, hire purchase agreements, unpaid credit card balances)		

9. DEPENDENT CHILDREN (see guidance notes)

Include the child to whom this application refers: if more than 4 children, give details on a separate sheet

	1	2	3	4
a Forename				
b Date of Birth				
c Name of School or College				
d Boarding or Day				
	£	£	£	£
e Annual school or other educational fees (excluding extras and sundry disbursements)				
f Compulsory additional school charges				
g Amount of fees covered by:				
i. Scholarships, bursaries or other allowances given by school				
ii. Services/Diplomatic/ Company Education Allowances (gross)				
iii. Annual sum arising from educational insurance policies				
iv. Assistance from any other sources e.g. grandparents and/or other members of the family and/or friends, trusts, charities, etc (please specify)				
h Capital value of trust(s) held on behalf of child/children				

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 the bursary awarded.

10. OTHER DEPENDENTS – please give details (see guidance notes)

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11. VERIFICATION OF INCOME, OUTGOINGS, ASSETS & LIABILITIES

Please enclose documentary evidence in support of the figures in Sections 4-8 and please tick those you are enclosing or insert 'N/A' if the documentation is not relevant to your application.

Please do not submit original documents.

a	INCOME	Enclosed – for both parents/ guardians	INCOME	Enclosed – for both parents/ guardians
	Current payslips for the last 6 months		Social security documentation (eg letter from HMRC) confirming your current benefits for 2019 – 2020 and 2020 – 2021	
	Final payslip for tax year 2019-2020 (usually dated to end of March 2020)		Court orders and legal separation agreements in force including payments towards school fees, child maintenance and other maintenance payments	
	P60 for the year to 5th April 2020 , and if relevant, P45(s) (part 1A) for any employment discontinued between 6th April 2019 and 5th April 2020		Copies of most recent dividend vouchers for investments and bank, building society interest certificates etc	
	Self-assessment tax calculation for the year to 5th April 2020		For any rental income a copy of current tenancy agreement and the relevant section of the self assessment tax return showing gross rental income and expenses for the year to 5th April 2020	
	Annual report and accounts (including trading, profit & loss and balance sheet) for business or trade for the accounting year 2019 – 2020		Other (<i>please specify</i>)	
	If self-employed, evidence of earnings SA302 tax calculation or a statement of earnings from an independent accountant and a breakdown of income and expenditure for the year to 5th April 2020 (see Section 5b)			

11. VERIFICATION OF INCOME, OUTGOINGS, ASSETS & LIABILITIES (continued)

Please enclose documentary evidence in support of the figures in Sections 4-8 and please tick those you are enclosing or insert 'N/A' if the documentation is not relevant to your application.

Please do not submit original documents.

b	CAPITAL ASSETS	Enclosed – for both parents/ guardians	CAPITAL ASSETS	Enclosed – for both parents/ guardians
	Latest statements for bank, building society, savings accounts etc; including current account bank statements for last 12 months		Current valuations for any properties owned (an internet valuation is acceptable)	
	Latest investment portfolio valuation for shares and bonds (can include internet valuation)		Latest insurance certificate covering valuable items only	
	Latest investment statements eg ISAs, unit trusts;		Other <i>(please specify)</i>	
c	OUTGOINGS & CAPITAL LIABILITIES	Enclosed – for both parents/ guardians	OUTGOINGS & CAPITAL LIABILITIES	Enclosed – for both parents/ guardians
	Latest mortgage repayment statement for all properties owned showing outstanding mortgage repayable, annual capital and interest payments		Latest loan statements, financial agreements, unpaid credit card balance statements etc	
	Tenancy agreement and latest statement of rental payments for any rent payable on principal residence		Other <i>(please specify)</i>	

Please provide any additional documentation to support the recent and sudden change(s) to your circumstances that has prompted this hardship application as described in Section 4.

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a hardship award 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 or an award, and if so to which and with what result.

ANY ADDITIONAL INFORMATION *(please continue on the final page if necessary)*

12. HOME VISIT

Please note that a representative of the School from Bursary Administration Limited may undertake a home visit to discuss your application. The Home Visit Consent Form attached herewith (Annex B) should be signed and returned by both parents / applicants (or see below) with the completed and signed means testing form and the requisite supporting documentation.

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, outgoings, assets and liabilities on the means testing form. We/I understand that the means testing form and requisite supporting documentation must be returned to the School by the deadline specified in order for our/my child to be considered for financial support and failure to do so may invalidate our/my application.

We/I understand that if we/I are/am offered a financial hardship award for our/my child who is currently a pupil 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 to your billing account for the relevant term;
- b) we/I understand that a hardship award is subject to termly review, and we/I must complete a termly declaration as appropriate 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 financial assistance may be withdrawn or reduced if:
 - i) we/I act or our/my child acts in breach of the School's Standard Terms and Conditions referred to in the Acceptance Form for our/my child at the School;
 - ii) we/I have failed to return the termly 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 School, 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 financial assistance will be withdrawn and the value of any amount of the award 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 given.

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.

ANNEX A to 'Financial Assistance with Fees: Means Testing Form in Support of an Application for a Financial Hardship Award'

NOTES FOR GUIDANCE FOR COMPLETION OF GRANT APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the means testing form.

The School reserves the right to seek any other documentary evidence in support of the figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in **sterling**. References to Her Majesty's Revenue & Customs (HMRC) include the relevant national taxation authority.

SECTION 2: PARENTS/APPLICANTS

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 (as amended from time to time) 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:
 - i) a subsisting residence order made under section 8 of the Children Act 1989; or
 - ii) 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 a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; 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 School, both mother and father will be required to complete and sign the 'Means Testing Form in Support of an Application for a Hardship Award'. For confidentiality, the parents can submit separate applications and details of this application will not be divulged to the other parent. However, both applications will be treated as one application for the assessment process.

SECTION 4: DETAILS OF CHANGE(S) TO FINANCIAL CIRCUMSTANCES THAT HAVE PROMPTED THIS APPLICATION FOR FINANCIAL HARDSHIP

A hardship award may be made available to a pupil already in the School whose ability to pay has declined significantly due to unexpected and unforeseen circumstances. The School cannot guarantee to provide financial support. Such awards are granted on a termly basis and priority will be given to pupils in the GCSE or final A-level years. In exceptional circumstances where parents require assistance for more than one term then it will be necessary to reapply.

In this section please outline the unexpected circumstances that have impacted your financial situation, potentially affecting your ability to pay the school fees and has prompted this application.

Please include any supporting documentation to verify this eg current payslips for the past 6 months, bank statements for the last 12 months, any relevant correspondence from your employer, GP, consultant or legal adviser.

SECTION 5: INCOME

The gross annual income from **all** sources, for the tax year specified in Section 5, must be declared including income generated outside of the UK. Sources of income include, but are not limited to, the following:

i) Earned income for the tax year specified in Sections 5a and 5b

- a) Gross annual amount of salaries and wages, including any gross earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity and paternity pay giving gross amounts (before deduction of tax, NI, pension, superannuation, etc). This should be declared for the financial year ending on 5th April for the tax year specified in Section 5 and should include any new and discontinued employment during that tax year.
- b) Taxable business profits from a business or profession or gross self-employed earnings as declared to HMRC or the relevant tax authority for the year in question should be shown on the means testing form. To verify your business or self-employed earnings, a copy of your self-assessment tax return submitted to HMRC for the relevant tax year should be provided. For business accounts, copies of the latest set of accounts for the relevant tax year should also be included. For self-employed earnings, confirmation of self-employment income from an independent accountant to verify the earning on your tax return is also required **or** a copy of form SA302 tax calculation which can be obtained from HMRC after submitting your annual tax return. Further information regarding SA302 is available as follows: <https://www.gov.uk/sa302-tax-calculation>. A breakdown of income and expenditure for the relevant tax year should be included if this is not evident from other documentation submitted.

Where the business profit declared covers a period in excess of or less than 12 months, please state the length of that period. The amounts declared should **not** include any non-business/personal items. Any director(s) drawings or dividends issued for the year should be clearly identified.

ii) Current earned income before and after the event that has impacted your earning capacity and your potential to pay the school fees

- c) To allow a comparison to be made between the change in your level of income before and after the sudden and unexpected event that has affected your earning capacity, please provide details of your income before the event in Section 5 c) (i) and after the event in Section 5 c) (ii). Please provide at least 6 months of payslips (or other documentation if you are self employed) to show the change in your level of income.

iii) Un-earned income for the tax year listed in Sections 5d, 5e, 5f (and 5g if applicable)

- e) All other unearned investment income (e.g. National Savings interest, building society interest, bank deposits, dividends, annuities etc) should be entered gross of tax. If tax was deducted at source, please add back the amount of tax paid or tax credit notified.
- f) Enter income from letting or subletting of property as the amount of the taxable profit declared to HMRC; **net of related expenditure before tax.**
- d, g) All pensions, state benefits and social security benefits received should be declared and the type of pension or benefit specified. The most common social security benefits that are taxable are: Jobseeker's

Allowance, Carer's Allowance, Disability Living Allowance, Incapacity Benefit, contribution-based Employment and Support Allowance (ESA). If known, please list expected pension, state and social security benefits for the next tax year and provide a copy of the appropriate letter from HMRC for example.

iv) Other income for the tax year listed in Section 5

- h, i) Details of Court Orders, legal separation agreements and voluntary arrangements for school fees should be provided whether or not the order or agreement is being complied with. Where a parent is required by a Consent Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the school fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any financial support to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Consent Order or separation agreement, applicants are not eligible for a hardship award. You should indicate how much is payable, how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of child support maintenance must also be declared.

Where a parent makes payments under a Consent Order or a separation agreement, the gross amount paid during the year should be clearly entered as a negative value. In cases where a parent both receives and pays such sums, two separate entries should be made.

- j) Please include 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; winnings such as Premium Bond and lottery prizes.

SECTION 6: OUTGOINGS

- a) Enter tax on earned and unearned income for the tax year specified (including investment income) separately.
- b) Enter national insurance contributions on earned income for the tax year specified (from employed, self-employed, business income).
- c) Enter annual superannuation contribution of (if applicable) payments to other pension schemes separately for the tax year specified.
- d) Enter capital as well as interest payment on a mortgage for the principal residence and other mortgaged residences owned. Please specify whether it is your principal or other residence.
- e) Complete this if mortgage repayment is effected by means of a full endowment policy.
- f) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).
- g) Complete this if your principal residence is subject to a tenancy rental agreement.
- h) Please list separately any outgoings that have arisen as a result of your sudden and unexpected change(s) in circumstances which have prompted this hardship application eg legal fees, additional travel expenses.

SECTION 7: PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

- a) Declare the capital sum of any monies on deposit with any bank, deposit taker, building society, National Savings accounts and Premium Bonds etc. Equity investments in stocks and shares, unit trusts, corporate bonds, government stocks, ISAs and other securities valued as near as possible to the date of submitting the application form should also be declared.
- b) Confirm the current market value of your principal residence. An online estimate or valuation is acceptable.
- c) Confirm the current market value of any possessions of value (including items listed separately on your contents insurance) such as collections, paintings, jewellery etc and the value of any cars owned or under a hire purchase or finance agreement with the option to purchase at the end of the agreement. It is not necessary to include the value of general household contents not listed separately on your contents insurance policy.
- d) To understand how your financial circumstances have been affected, please provide bank statements for all current accounts held for the last 12 months. These statements should include all transactions debited/credited to the bank account(s). Please record the closing balance(s) of your most recent statement(s) in Section 7 d). If you hold more than one account, it is helpful if you list these separately.
- f) If you run your own business or are partners in a business, then you should show the net worth of the business and the percentage owned. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- g) In the case of second homes and/or other properties, these should also be included at their estimated current market value; **no allowance will be made for any outstanding mortgage.**

SECTION 8: PARENTS'/APPLICANTS' CAPITAL LIABILITIES

- a) Details of the principal and any other mortgaged residences should be provided along with the lender's details.
- b) Details of any outstanding loans, hire purchase agreements, credit card balances and other finance leases and agreements should be provided. Please state the purpose of the loan etc, and the termination date.

SECTION 9: DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

- e) - g) The figures to be inserted here refer to the current academic year, **2020 - 2021**.
- g)(ii) Members of HM Forces and Diplomatic Service should include the amount of any education allowances which they receive. Parents in other occupations should include any similar sum.
- (iii) Insurance policies for school fees - if any insurance policy for the payment of school fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for any financial support. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.
- (iv) Where a trust has been established in favour of the child for whom you are applying, details of the trust should be entered.
- h) You should enter the capital value of any beneficiary or other trust set up for each child.

SECTION 10: OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

SECTION 11: VERIFICATION OF INCOME, OUTGOINGS, ASSETS & LIABILITIES

You should submit the required documentation listed in this section including any additional documentation that may be relevant to your application. To indicate which documents are enclosed, please tick each section **or** insert 'N/A' if the document is not relevant to your application and is not enclosed. All documents provided should be **copies** of the originals as the School cannot guarantee the safe return of any original documentation submitted.

SECTION 12: HOME VISIT

Please complete and sign the Home Visit Consent Declaration in Annex B, pp. 20-22. This declaration should be returned with your completed means testing form and support documentation.

SECTION 13: DECLARATION

Please complete and sign the declaration to confirm you have made a complete and accurate statement of your income, assets, outgoings and liabilities, supplied the necessary documents and you understand that the terms and conditions noted in the declaration will apply to your application.

See note in Section 2 for signatures required.

ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of your hardship application, e.g. a known significant change in income or outgoings for the coming year, such as a forthcoming inheritance.

CONFIDENTIALITY

The School respects the confidentiality of hardship awards made to families. Parents are expected to do likewise and are not expected to disclose to others the details of the financial hardship award they have been granted. A breach of confidentiality may result in the termination of the financial hardship award. Under the terms of the General Data Protection Regulation 2016/679 and the Data Protection Act 2018, the School is the Data Controller and information submitted in connection with an application for financial support will be processed lawfully and fairly in accordance with this legislation and the School's Privacy Notice.

ANNEX B to ‘Financial Assistance with Fees: Means Testing Form in Support of an Application for a Financial Hardship Award’

Bursary Administration Limited – Home Visit Consent Declaration Assessing Your Application – Data Protection Considerations

The School reserves the function of making a decision regarding your application for a hardship award, but may employ the services of Bursary Administration Limited (BAL) to undertake a home visit and review the information which is used to make this decision.

This means that, for the purposes of your application:

- the school is the Controller of your information
- BAL is the Processor of your information
- BAL is registered with the Information Commissioner’s Office and has satisfied the school as to its arrangements regarding the security of any information and documents you may provide as part of your application. BAL’s Privacy Policy can be read [here](#).

Please note that no application will be considered unless the process as detailed below is followed. **IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ARE ALSO TAKEN TO HAVE CONSENTED TO THE FOLLOWING PROCEDURE:**

1. A Means Testing Form will be completed and sent to the school as detailed in the ‘Financial Assistance with Fees’ booklet. Supporting paperwork as required must be included.
2. If a home visit is required, the School will inform you. Your Means Testing Form and supporting paperwork will be scanned and forward securely to BAL using SharePoint together with the signed home visit consent declaration below.
3. Once BAL has received notification of your acceptance of their involvement in the application process (it the signed home visit consent declaration), BAL will contact you to make arrangements for a home visit as required by the School, or to make enquiries which will ensure that any paper financial review is as correct as it can possibly be.
4. BAL will send its report on your application securely to the School through SharePoint and will then withdraw from the process unless the School has any further enquiries it wishes BAL to make.
5. BAL will shred any scanned/photocopied evidence documents securely using an authorised service, and scan and store securely on SharePoint its notes regarding your application; these notes will then be shredded securely using an authorised service. This process is undertaken once per year, and any papers will be held securely until then. If it has been necessary to submit any original documents, these will be returned securely to the School.
6. Your electronic records will be kept securely on SharePoint, and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of considering your application for financial support only, and your information will not be passed to any third party or used in any other way whatsoever.

BAL can arrange to share reports between schools if you are applying to more than one school for financial support, but this will not be done without **your** written permission (email will suffice), and the permission of the school on whose behalf BAL first visited.

You are entitled to request that your information be deleted permanently at any time.

It should be noted that the report produced by Bursary Administration Ltd is the property of the School and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

Bursary Administration Limited – Home Visit Consent Declaration

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

Full name of pupil

Applicants' Details

Applicants' address

.....

Applicants' contact telephone numbers

.....

Applicants' email addresses

.....

Applicants' Signatures

Signature of Parent/Guardian/Carer

Name of Parent /Guardian / Carer

Relationship to pupil

Date

Signature of Parent/Guardian/Carer

Name of Parent /Guardian / Carer

Relationship to pupil

Date

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