

Coventry School Foundation Covid19 Support Application Form
Confidential Statement of Financial Circumstances for Assistance with School Fees

COVID19 SUPPORT APPLICATION FORM

Please read the Notes for Guidance before completing this questionnaire

1. CHILD	
a	Full Name
b	Date of Birth
c	Current School/Year
d	Present Address
	Post Code

2. CONTACT DETAILS (see note 1)			
		Father/Step Father/Partner	Mother/Step Mother/Partner
a	Full Name		
b	Title		
c	Address (if different from above)		
	Post Code		
d	Day time Tel. no.		
e	Evening Tel. no.		
f	Mobile no.		
g	Fax		
h	E Mail Address		

3. OCCUPATION			
		Father/Step Father/Partner	Mother/Step Mother/Partner
a	Employed (complete employer's name address and telephone number)		
	Job Title		
b	Self employed (complete name and type of business)		
	Are you a Director, Shareholder or Proprietor of this Company/Business? State which?	Yes / No	Yes / No

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	If "YES" state proportion of Company or Business owned by you and/or your spouse/partner		
	Company/business Tel no.		
	Company/business email address		
c	Unemployed		
d	Retired		
e	Have you or your partner/spouse been made subject of an IVA or a Bankruptcy Restriction Order?		
f	Do you or your partner/spouse have any County Court Judgements registered against you?		

4. INCOME (See Note 2)

(Please enter below your earnings and income from all sources for the latest tax year)

		Father/Step Father/Partner	Mother/Step Mother/Partner
a	Gross Salary (including overtime, bonuses, all taxable benefits & expenses as shown on P11D)		
b	For self-employed, state taxable profits of trade or profession pre drawings for last three accounting periods	a. b.	a. b.
c	Income from Government Furlough of salaries. Please provide documentation. For self-employed state income from Government Furlough. Please provide documentation.		
d	Gross pension, widow's pension, State pension, Company pension etc		
e	Gross investment income from:		
	• Building Societies /Banks		
	• Dividends and interest (other securities)		
f	Gross rental income from other Properties or lodgers or paying relatives living in the main residence.		
g	Social Security benefits: (Please identify which benefits eg PIP, ESA, JSA, and Carers Allowance). Have you applied and received Universal Credits, if so please provide documentation.		

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h	Child Benefit		
i	Working/Child Tax Credits		
j	Separation or Maintenance Allowance		
k	Is there a Court Order/Separation Agreement? If yes, please state annual amount payable for school fees. Please supply a copy of the agreement.	Yes/No	Yes/No
l	Benefits in Kind provided free by reason of employment, not already included in (a) above eg Petrol, Car Tax, Insurance.		
m	Any other income or gains not included in (a) to (k) above eg: child trust fund, child's own income, estate income, gains on sale of capital assets, surrenders of life or assurance policies or insurance policies for school fees etc Any Inheritance or Legacies expected within the next 12 months?		
For self-employed what percentage of gross income is cash: O less than 20%: O less than 40%: O less than 50%: O greater than 50%.			
Please send a copy of your self assessment tax calculation for the previous three years.			

5. OUTGOINGS (See note 3)			
		Father/Step Father/Partner	Mother/Step Mother/Partner
a	Tax payable on Incomes declared above <i>(including tax deducted at source).</i> If self-employed have you asked HMRC to defer business Tax & VAT? Please provide correspondence.		
b	National Insurance Contributions		
c	Pension contributions (net)		
d	Mortgage repayments <i>(include capital repayment as well as interest).</i> Have you applied for a repayment holiday from your mortgage provider? If so how many months? Please provide the correspondence.		
e	Endowment mortgage insurance premium and main residence insurance premium (buildings & contents). Have you asked to Furlough Endowment repayments? Please provide documentation.		

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f	Car finance monthly instalments. Have you asked the Leasing Company to Furlough monthly repayments for 3 months? Please provide correspondence		
g	Hire Purchase monthly instalments Have you asked the Finance Company to Furlough repayments for 3 months? Please provide correspondence		
h	Credit cards minimum monthly instalment		
i	Bank Loans monthly instalment or any secured loans on main residence. Have you asked the Bank to Furlough Bank Loan repayments for 3/6 months?		
j	Any other interest payable e.g. overdrafts etc (<i>please specify</i>)		
k	Annual landlord rent, service charge payable on main residence. Have you asked Landlord to Furlough rent for 3 months? Please provide correspondence.		
l	Mortgage repayments (<i>include capital repayment as well as interest</i>) on Home or other Properties as outlined in 6(g) Have you asked the Mortgage provider for a repayment holiday? Please provide correspondence.		

6. CAPITAL ASSETS (see Note 4)			
		Father/Step Father/Partner	Mother/Step Mother/Partner
a	Approximate market value of all investments		
	<ul style="list-style-type: none"> • Building Society/Bank deposits/National Savings accounts • Equity investments, (shares, unit trusts, corporate bonds and other securities) and Government stocks. • PEPs, ISAs, TESSAs , TOISAs • Life assurance bonds and policies including endowments 		
b	Approximate market value of main residence (<i>freehold or leasehold</i>) please provide latest valuation. Please specify your interest in this property. Are you a joint owner/sole owner of the property? If main residence address is different from address in 2 please state main residence.		
c	Approximate market value of other possessions including house contents, cars, collections, paintings, jewellery etc		
d	Cash at banks or elsewhere (please provide bank statements for all accounts)		

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e	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 in the last five years</i>)		
f	Net worth/value of any businesses which you own or share or have an equity stake in.		
g	Approximate market value of your interest in any other property, land or buildings either in UK or abroad. Please specify the addresses of each property.		
h	Redundancy, employment separation or lump sum payments or other termination payments received or anticipated in the next 12 months.		
i	Monies that are owed to you. Please specify the debtors and amount each owes.		
j	Other assets not listed e.g. share options, value of child's trust fund/ interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc		
TOTAL CAPITAL ASSETS			
7. CAPITAL LIABILITIES (see Note 5)			
		Father/Step Father/Partner	Mother/Step Mother/Partner
<i>(Please give details of any capital charges against the assets declared in Section 6)</i>			
a	Mortgage Details		
	<ul style="list-style-type: none"> • amount outstanding on principal main residence including any secured loans on the main residence.(Copy of current mortgage statements) 		
	<ul style="list-style-type: none"> • a final payment dates 		
b	Mortgage details for holiday home, other properties, land & buildings in UK/Abroad		
c	Car Finance amount outstanding (copy of Car Finance Agreement)		
d	Bank Loans amount outstanding (copy of Loan Agreement)		
e	Hire Purchase amount outstanding (copy of agreement)		
f	Credit cards amount outstanding (Last 3 month statements).		
g	Copy of Endowment Policy Statement		

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h	Other liabilities e.g. overdraft (<i>please specify</i>). Please include County Court Debts, Bankruptcy liabilities.		
TOTAL CAPITAL LIABILITIES			

8. NET ASSETS		
	Father/Step Father/Partner	Mother/Step Mother/Partner
TOTAL ASSETS (Total of section 6)		
LIABILITIES (Total of section 7)		
NET ASSETS (Section 6 minus Section 7)		
<p><i>Please explain any reasons why net assets cannot be converted or used to pay school fees</i></p>		

9. DEPENDENT CHILDREN (See Note 6)					
<i>(Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)</i>					
		1	2	3	4
a	Name				
b	Date of Birth				
c	Name of Current School/College/University				
d	Boarding or Day				
		£	£	£	£
e	Annual school or other educational fees (<i>excluding extras & sundry disbursements.</i>)				
f	Compulsory additional school charges.				

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g	Amount of fees shown in (e) covered by:				
	i. Scholarships, Bursaries or other allowances given by school				
	ii. Annual sum arising from capital repayment scheme				
	iii. Services/Diplomatic/ Company Education Allowances (gross) (<i>state whether sum has been included in gross salary at 4 (a)</i>)				
	iv. Annual sum arising from Educational Insurance Policies				
h	v. Assistance from any other sources e.g. Grandparents, trusts, settlements, legacies, charities, etc. (<i>please specify the source and amount from each</i>).				
	• Annual unearned income of child (<i>if any</i>)				
	• Capital Value of Trust				

10. OTHER DEPENDENTS (See Note 7)

11. VERIFICATION OF INCOME Please enclose documentary evidence in support of the income figures in Section 4 and tick those you are enclosing. If you have not enclosed any of the documents requested please give an explanation in the box marked 'Any Additional Information'		
	Father/Step Father/Partner	Mother/Step Mother/Partner
P60 for last 3 years- for each employment		
P11D (taxable expenses and benefits) for last 3 years		
Annual statement of pension contributions received for the last 3 years.		
Last 3 months payslips.		

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Copy of last HMRC tax calculation issued under Self-Assessment.		
Copy of last 3 months Bank and/or Building Society statements for all accounts held.		
For self-employed applicants, a copy of signed audited Business Accounts (including profit & loss, Balance Sheet & cashflow) for past three years.		
Confirmation of Schedule D self employment income from an independent accountant		
Letter from DWP showing amount and type of Benefit eg Housing/Council Tax/Jobseekers//ESA/PIP. Produce award notices		
Child Benefit Award Notice.		
Working/Child Tax Credit Letter (all pages)		
Child/Maintenance Support Statement		
Share & Dividends Statement		
Annual Interest on Savings Statement		
Redundancy Statements		
Property Rental Income Statement		
Copy of Council Tax bill (showing single person discount and/or benefit)		
Others (<i>please specify</i>) e.g. bank interest certificates, Quarterly VAT returns, statement of means prepared by the accountant etc.		

12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing:		
	Father/Step Father/Partner	Mother/Step Mother/Partner
Property Valuation (enclosed latest valuation) of all properties owned in UK & Abroad		
Mortgage Statement & name of Lender		
Contents Insurance Certificate		
Investment Portfolio Valuation		
Other		

13. HOME VISIT	
The Foundation may wish to visit you at your home address to discuss your application for Covid19 Support with a member of staff and/or a school governor.	

ANY ADDITIONAL INFORMATION

14. DECLARATION

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

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

We/I understand that if we/I are/am offered Covid19 Support for our/my child, the following terms and conditions will apply as between ourselves/myself and the Foundation:-

- a) we/I understand that any award of Covid19 Support is subject to a three month review and in order to provide continued Covid19 Support we/I must update our/my financial circumstances on the form sent to us/me by the Foundation and supply all relevant up to date supporting evidence by the return date indicated;
- b) we/I will report immediately to the Director of Finance, Mrs Jacqui Hammond, any material change or improvement in the financial position declared;
- d) we/I will treat the Covid19 Support as a confidential matter between myself/ourselves and the school;
- e) the Covid19 Support may be withdrawn or reduced in certain circumstances & past payment reclaimed 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 Covid19 three month Renewal Application Form containing the updated declaration of our/my financial circumstances by the return date indicated;
 - iii) we/I have failed to produce within a specified period, 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 30 days in arrears in respect of any fees due and owing to the Foundation;
 - vi) there is a material change in our/my financial circumstances;
 - vii) the Foundation's resources are insufficient to maintain the level of Covid19 Support;
 - viii) the details of the award are disclosed to third parties.
- f) the Covid19 Support will be withdrawn and the value of any amount of support previously credited against our/my child's fee account will become repayable, without notice, if any of the information disclosed in this application is found to be untrue and we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Covid19 Support. The Foundation may take such action as may be appropriate to recover any sums paid by way of Covid19 Support in such manner as the Foundation may be advised.
- g) I further understand that in making this application, I authorise the Foundation to make any such inquiries that it may consider necessary in respect of my/our financial circumstances.

NOTE: the Foundation reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make any inquiries which it deems necessary for the provision of Covid19 support. By signing below you are giving Coventry School Foundation permission to do so.

Is there anything else about your financial circumstances, either at present or in the foreseeable future that you wish to disclose to the Foundation, which may affect your entitlement or non-entitlement to Covid19 Support?

Also are there any other possible sources of financial assistance not disclosed above that you have applied for? If so please supply documentary details including the result of such application.

Please note if the Covid19 Support Application Form is not fully completed, then the application will not be considered.

Signatures: (See Guidance Note 1)

Father/Step Father/Partner

.....

Date

Mother/Step Mother/Partner

.....

Date

See overleaf

PAGE LEFT BLANK FOR YOU TO CONTRIBUTE ADDITIONAL INFORMATION

NOTES FOR GUIDANCE FOR COMPLETION OF COVID19 SUPPORT APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Foundation if further information or advice is required.

The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make any 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.

1. 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/spouse (if any) of that parent where the partner/spouse 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 (or any earlier enactment) 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, residence 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 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/spouse (if any) where the partner/spouse 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 a separate Application Form.

2. INCOME

- a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, overtime, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, pension, etc) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) – at the amount shown on form P11D if issued.
- b) Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question pre drawings (deductions should be made only in respect of capital allowances, losses & stock relief). Copies of the signed latest set of accounts should be included (Profit & Loss, Balance Sheet & cashflow) for the last 3 years. For self-employed applicants, please state what percentage of Gross income of the business is cash on the Bursary application form.
- d) All other Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.
- e) Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; and royalties and all other sources including entertainment and travel allowances etc.
- f) All social security benefits received should be declared and type of benefit specified.
- j) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court 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 Covid19 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 Court Order or separation agreement, applicants are not eligible for support. You should indicate 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 be declared.

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- k) Include free benefits in kind agreed by HMRC not subject to tax, e.g. representative occupation of house, free meals etc.

3. OUTGOINGS

- a) Enter Income Tax and tax on unearned income SEPARATELY.
- b) Enter capital as well as interest payment on a mortgage for the principal residence. Also include capital and interest payment on a secured second mortgage/loan on the principal residence.
- c) Copy of Endowment Policy showing outgoings
- d) Include Bank Overdraft, Credit Cards, Car Finance instalments, Hire Purchase instalments, Bank Loans and any other loan charges incurred during the year (specifying the purpose of the loan). Please enclose copies of the agreements for Car Finance, Bank Loan, Hire Purchase and for Credit Cards, the last 3 months statements
- e) Enclose the Rent Agreement indicating monthly rental charged on the main residence.
- f) Enter capital as well as interest payment on a mortgage for any holiday home or other properties, land & buildings either in UK or abroad as outlined in 6(g).

4. CAPITAL ASSETS

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

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- b) The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.
- f) If you run your own business or are partners in a business, then you should show the net worth of the business. 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 in UK or abroad, these should also be included at their estimated current market value; any outstanding mortgage should be listed in section 7b.

5. CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

6. DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying. If you have more than 4 dependent children continue on the back page. Dependent children are children under 16 living at your address and children over 16 who reside at your address and who are in full time education (this includes children who are away at university during term-time but reside with you during the holidays).

- e) The figures to be inserted here refer to the current academic year.
- g)
 - i) 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
 - ii) 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 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.
 - iii) Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.
- h) Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

7. OTHER DEPENDENTS

If you qualify for Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, disability, etc. Income received for their care should be included in section 4.

8. ANY OTHER RELEVANT INFORMATION

Please enter, on this sheet if necessary, any details which may affect the assessment of Covid19 Support e.g. a significant change in income or outgoings for the coming year.