

# Elmfield School Fee Discount Application Form 2018 – 2019

Deadline 27<sup>th</sup> April 2018 at the latest

## Guidance notes

Elmfield School aims to make its education available to pupils from as diverse a range of background as is possible. Elmfield relies almost entirely on fees paid by families and therefore expects parents to view their payments to Elmfield as a top priority.

- There is no discount available for Parent and Child Group or for boarding pupils.
- It is recommended that parents use the discount calculator to see whether they may be eligible for a discount application.
- Families who live more than 35 miles from the School are not eligible for a discount. Families must have lived within 35 miles from the School for one full year before they may become eligible for a fee discount.
- There is a finite budget for fee assistance and there is no guarantee of a discount being given or being maintained at a level offered previously. The School reserves an absolute right of discretion.
- All families are subject to the following minimum charges: £3,720 per year for one child; £5040 per year for two children; £6,360 per year *in total* for 3, 4 or 5 children (4<sup>th</sup> and 5<sup>th</sup> children are free); £8,000 per year for 6 children and £2,000 per year for any additional children.
- Priority will be given to families already in the School, then to new applicants subject to eligibility. Applications after the deadline will lose any priority and full fees may become payable.
- Fee Discounts are offered on the basis of last resort. Applicants must consider all other possible sources of funding before applying to the School, including use of savings, relocation and family help.
- Families are expected to have explored every avenue to increase their income including claiming all benefits to which they may be entitled. Families re-applying for a discount may also be asked about attempts to find employment.
- Families whose income is reduced by a lifestyle choice will not be eligible (e.g. opting to leave paid employment to study/stay at home).
- Single parents who apply for discounts are expected to make reasonable endeavours to obtain a contribution to school fees and living costs from the absent parent.
- Applicants for fee discounting are expected to earn (short term only) a minimum amount of £6500 for couples or £2500 for single parents, and to demonstrate that they are making reasonable efforts to increase their income. Exceptional circumstances such as medical reasons or disability will be taken into account.
- All prior debts to the School must either be repaid or subject to an agreed repayment plan.
- The decision of the Finance Committee is final.

***Hard copy applications only will be accepted.***

***Please supply photocopies of any documentation you provide. Documentation will not be returned.***

***You are required to submit bank statements for all your bank accounts covering the period 1<sup>st</sup> Jan 2018 to 30<sup>th</sup> Mar 2018 in addition to items outlined in the form below. For the self-employed, please provide your most recent 2 years of accounts.***

## SECTION A – PARENT AND PUPIL DETAILS

Full names of parent / guardian and partners who share the pupils' address	Relationship to pupils	Daytime phone no.	Email address

Full Name of each pupil applied for	Class in Sept 2018
Address	
Postcode	
Name of non-resident parent (if applicable)	Phone no.
Contact address of non-resident parent:	Email
Postcode	

**Please list any children in Kindergarten in receipt of funding.**

**SECTION B INCOME FROM EMPLOYMENT**

	Parent / Guardian 1	Parent / Guardian 2
Name		
Occupation		

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Current annual gross income 2017 /2018			Form P60	
Tax payable for 2017 /2018				
National Insurance 2017 / 2018				

If you do not have your P60 please provide your March 2018 pay slip

**SECTION C SELF-EMPLOYED INCOME**

**Complete this section if you are self-employed and do NOT own a limited company.**

Nature of self-employed activity	
When did you start this activity?	
Names of any business partners	

**Documentation required in all cases:**

- **Business accounts and a copy of your full tax return for the last two years to 5<sup>th</sup> April 2017.**
- **Management accounts for current year or personal current bank statements for period 6<sup>th</sup> April 2017 to 5<sup>th</sup> April 2018.**
- **Any additional information if your income has changed substantially.**

Annual figures required	Parent / Guardian 1	Parent / Guardian 2
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Actual gross income			
Tax payable 2016 /2017			
National Insurance payable 2016 /2017			

**SECTION D INCOME FROM YOUR OWN COMPANY OR LLP**

Name of Company	Company No.	Date of Incorporation
Business Activity of Company		
Ownership Details, including shareholders, and their relationship to you.		

**Documentation required in all cases:**

- *Copy of latest accounts filed with Companies House (full accounts) and management accounts for the period since then*
- *The last two personal and corporate tax returns submitted*
- *Estimated income for April 2018 – April 2019*

Annual figures required	Parent / Guardian 1	Parent / Guardian 2	
Salary drawn – last 2 years (P60 to 05/04/18) or March 2018 payslip			
Dividend income – last 2 years			
Tax payable, to 05/04/18			
National Insurance paid			

**SECTION E WORK RELATED CHILDCARE COSTS**

	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
Childcare costs incurred solely for the purposes of work			Receipts or invoices for 2017 /2018	

**SECTION F****INCOME FROM STATE BENEFITS 6<sup>th</sup> April 2017 – 5<sup>th</sup> April 2018**

<b>Annual</b> figures required	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
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	
Council Tax Benefit			Copy of award notice	
Income Support			Copy of award notice	
Job Seekers' Allowance			Copy of award notice	
Widow(er)'s Benefit			Copy of award notice	
Other Benefit			Copy of award notice	

**SECTION G****OTHER INCOME****6<sup>th</sup> April 2017 – 5<sup>th</sup> April 2018**

<b>Annual</b> figures required	Parent / Guardian 1	Parent / Guardian 2	Documentation Required	
Income from lodgers				
Any sum in aggregate received from friends or family including for payment of school fees				
Income from a former partner other than the parent of your child(ren)				
Any other income including investment, pension etc			Recent statement	
Details of other income				

<b>HOME OWNERS: complete this section if you own or part-own the property that you live in</b>		Documentation required	
Market value of the property		Valuation if available	
Mortgage outstanding		Latest mortgage statement	
Mortgage capital payment for last 12 months			
Mortgage interest payment for last 12 months			
Annual Council Tax payable		Latest Council Tax Advice notice	
<b>TENANTS: complete this section if you are a tenant in the property you live in.</b>			
Current <b>annual</b> rent		Rental Agreement	
Annual Council tax payable		Latest Council Tax Advice Notice	

## SECTION I

## SECOND AND SUBSEQUENT PROPERTIES

Complete this section if you own or part-own a property which is not your main residence. If you own two or more such properties, provide aggregate figures.

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Market value of property	£		Valuation(s) if available	
Mortgage outstanding	£		Latest Statement(s)	
Mortgage capital payment for last 12 months				
Mortgage interest payment for last 12 months				
Gross annual rental income before tax			Accounts	
Address(es) of second or subsequent property / properties.				
If you part-own this property/properties please give details of the % owned, other owners and their relationship to you.				

**SECTION J OTHER CAPITAL ASSETS***Declare all savings, investments or other capital assets in this section*

	Parent / Guardian 1	Parent / Guardian 2	Documentation required	
Savings accounts	£	£	Latest statement	
Savings in bonds or similar	£	£	Latest statement	
Stock market investments	£	£	Latest valuation	
Other assets	£	£		

**SECTION K MAINTENANCE INCOME***Complete this section of you are separated from your children's other parent.*

Do you receive any of the following from your ex-partner?	Amount per year
A contribution to school fees	£
Maintenance income to cover living costs	£
Contribution in kind, please give details	
Please give details of contact with your ex-partner, indicating whether regularity of contact	
You	
Your child(ren)	
Are you satisfied that your ex-partner is making reasonable overall contribution to the costs you incur in relation to your child(ren)?	
If no, please outline the attempts you have made to enforce payment of maintenance:	

Please use this space for any further details which you feel would support your case.

#### DECLARATION

Parent / Guardian 1	Parent / Guardian 2
I declare that the information provided on this form is a complete and truthful statement of my income from all sources and of my assets of all kinds.	I declare that the information provided on this form is a complete and truthful statement of my income from all sources and of my assets of all kinds.
I undertake to notify Elmfield School immediately should there be any material change to my financial circumstances.	I undertake to notify Elmfield School immediately should there be any material change to my financial circumstances.
I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the School will become immediately repayable as a debt.	I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the School will become immediately repayable as a debt.
I agree to be jointly and severally liable for this undertaking with Parent / Guardian 2.	I agree to be jointly and severally liable for this undertaking with Parent / Guardian 1.
Full name	Full name
Signature	Signature
Relationship to pupil	Relationship to pupil
Date	Date

**Please return this form to the School Office no later than 27<sup>th</sup> April 2018 in an envelope clearly marked for the attention of the Bursar (*FEE ASSISTANCE APPLICATION*). Applications received after this date will not be processed and full fees will be charged.**