

Application for Community Supported Fee Assistance

This application form should be completed in full and sent with **all** relevant supporting documentation to:

Community Supported Fee Assistance Applications,
Finance Department,
St Paul's
Waldorf School,
1 St Paul's Road,
London
N1 2QH

We would like all applications submitted by **28th February**, late applications will reduce the likelihood of assistance being granted. Copies of documentary evidence are required in support of the information disclosed. Applications are strengthened if full documentation is provided and weakened if not. Some figures may not be accepted if they are unable to be substantiated.

Separate application forms can be submitted by parents, carers and legal guardians, who are divorced, separated or co-parent, where they each retain parental responsibility for their child.

The principle of last resort

We offer fee assistance on the principle that it is the last resort for the funding of school fees. Applicants must consider all other possible sources of funding before turning to the school.

Priority expectations

It is expected that after housing, utility, food and clothing costs, the cost of school fees is given first priority in your budget. We expect that they are prioritised over cost of holidays, out of school activities and the purchase of other items. Please consider all your children in your application and be aware that an increased need of fee assistance might not be met in possible future applications.

Community Supported Fee Assistance budget

At the beginning of the academic year, the Trustees set and limit a percentage of gross fee income which may be made available to fund the fees from existing and prospective children as well as providing for discounts awarded to staff and siblings.

Priority for assistance will be given to staff and then to siblings before new applications. Applications received after our stated deadlines will lose any priority status with the exception of staff and sibling discounts. Additional budget will not be made available once it has been utilised. Fee Assistance is granted subject to a minimum fee payable of £3,000.

State benefits

It is a requirement of our fee assistance programme that you must apply for all state benefits to which you are entitled before seeking fee assistance.

Please use the benefits calculator at www.entitledto.com to work out what benefits you are due.

Community Supported Fee Assistance at St Paul's Waldorf School is subject to the following conditions:

- Payment of fees is by ten equal monthly direct debits with the first payment being in our account by 1st September.
- All prior debts to the school are either repaid or subject to an agreed repayment plan.

Eligibility Criteria:

Parents, carers, guardians are **not** eligible to apply if they have "assessed" income over £35,000.

For the application, it is expected that each parent, carer or guardian will or is actively seeking employment and that the financial assistance required is temporary in nature unless there are reasons for this not to be the case such as periods of long-term illnesses.

It is important to note that the eligibility criteria are guidelines only and each case will be assessed on its own merit. The Trustees also recognise that life events happen which means some need longer or greater support for periods of time. Our objective is to support applicant(s) that are committed to the principles of the School and require genuine financial assistance.

Please indicate why you are making this application:

- Our/my child has an offer of a place in the Kindergarten
- Our/my child has an offer of a place in the Classes
- Our/my child is already at the school but there has been a change in my /our circumstances and this is my/our first application
- Our/my child is already at the school but there has been a change in my/ our circumstances, this is not my/our first application and previously received assistance in _____ academic year

Please continue on a separate sheet where necessary

	First child	Sibling	Sibling
Full Name (Please underline surname)			
Nationality			
Date of Birth			
When will/did your child/ren enter St Paul's?			
Class from next September			

The Parents, Carers, Guardians Please tell us about yourselves	Parent /Carer /Guardian 1	Parent /Carer /Guardian 2 (where applicable)
Full Name (Please underline surname)		
Title (Mr/Mrs/Dr/Other)		
Relationship Status		
Nationality		
Date of Birth		
Home Address (including post code)		
Daytime Telephone		
Evening Telephone		
Mobile		
Email address		

St Paul's expects applications for Community Supported Financial Assistance to be submitted by all parties with legal and financial responsibility for the child/ren.

It is expected and must be seen that the parent/carer/legal guardian making the application has used all possible endeavours to obtain a contribution to school fees and living costs from any other party financially responsible for the child/ren.

If applicable, are you satisfied that any other party financially responsible for your child is making reasonable overall contribution to the costs you incur in relation to your child/ren?

If you answered NO, when did you last have contact with them?

Where applicable, have you attempted to enforce payment of maintenance? Please give details: _____

SECTION 1

Income Please complete these details for a full 12 months based on your current income(s). Enter all amounts in whole numbers (British £) or put 0 if relevant. Supporting documentation is required	Parent /Carer /Guardian 1	Parent /Carer /Guardian 2 (where applicable)	Proof Required
Income from all employments:			
Gross salary (excluding bonus and benefits in kind and expenses)			P60 (latest) or P45 where applicable
Annual bonus			P60 (latest)
Is this bonus guaranteed?			P60
Tax payable			P60 or Tax return
National Insurance Contributions			P60 or Tax return
Income from self-employment:			
Taxable income from self-employed trade or profession			Financial Accounts and Tax returns for last 2 years
Tax payable			Financial Accounts and Tax returns for last 2 years
National Insurance Contributions			Financial Accounts and Tax returns for last 2 years
Income from your own Company or LLP:			
Gross salary (excluding bonus and benefits in kind and expenses)			Financial Accounts and Tax returns for last 2 years
Dividend income from owner-managed businesses			Financial Accounts and Tax returns for last 2 years
Tax payable			Financial Accounts and Tax returns for last 2 years
National Insurance Contributions			Financial Accounts and Tax returns for last 2 years
Benefits in Kind provided by reason of employment or business not already included above (e.g. car, health insurance)			
Gross investment income from:			

Building Societies /Banks			Statement
Dividends and interest (other securities)			Statement
Income from all other properties:			Confirmation letter
Rental profit as disclosed on your tax return			Tax return Property valuations
Number of properties this relates to			
Total Social Security benefit:			Confirmation letter for all
Please list all benefits you receive:			
Separation or Maintenance Allowance			Court order/ Separation or divorce agreement
Is there a Court Order or Separation Agreement?			
If YES, does this specify any arrangements for the payment of school fees?			
If YES, please state the amount to be paid in respect of each school year and by whom			
Any other income or gains not included in above:			
Income from other assets or trusts			Confirmation letter
Income from insurance policies or permanent health plans			Confirmation letter
Income from family members over £200(state from whom)			Confirmation letter
Income from lodgers			Confirmation letter
Other income			Confirmation letter
TOTAL INCOME (including benefits in kind)			

SECTION 2

Housing Costs	Parent /Carer /Guardian 1	Parent /Carer /Guardian 2 (where applicable)	Proof required
Do you own your home?			Mortgage statement/title deeds
If YES, please give approximate current market value of your home			Valuation if available
Please specify freehold or leasehold			Title deeds
Have you made recent improvements to your home?			
If YES, please give date of work:			
Approximate cost of home improvements			
Approximate enhancement in value			
Mortgage Details in respect of your home:			
Amount outstanding on principal residence			Mortgage statement
Final payment date			Mortgage statement
Is this a repayment or interest only mortgage?			Mortgage statement
Mortgage Capital Payment for last 12 months			Mortgage statement showing breakdown in interest and capital
Mortgage Interest Payment for last 12 months			
Council Tax			Confirmation letter
Annual landlord rent payable on residence			Rental agreement

SECTION 3

Childcare Costs incurred solely for the purposes of Work:			
Childcare expenses (au pair, childminder, after school clubs)			Receipts or Invoices

SECTION 4

Savings and Other Assets. Please tell us about the assets that you own	Parent /Carer /Guardian 1	Parent /Carer /Guardian 2 (where applicable)	Proof required
Approximate current market value of other possessions:			
Car(s)			
Make and Year of manufacture			
House contents/other items or collections (specify items of particular value)			Confirmation Statement
Approximate current market value of your interest in any other property, land or buildings either in the UK or abroad in total (please add specific details as an Appendix)			Portfolio statements
Cash at bank/building society:			
Current account			Statements
Savings accounts			Statements
Approximate current market value of all investments:			
Bank or building society deposits/ National Savings accounts			Statements
Equity investments, (shares, unit trusts, corporate bonds and other securities) and Government stocks			Portfolio statement
PEPs, ISAs, TESSAs			Portfolio statement
Any other assets held as investments			Statement
Net worth/value of any businesses which you own or share			
Redundancy or other termination payments			P45 or P60
Monies that are owed to you			
Approximate current market value of any other assets:			

Share options			Portfolio statement
Assets held by or on behalf of the candidate			
TOTAL OTHER ASSETS			

Please explain any reasons why assets cannot be sold or converted into cash to pay school fees. Please continue on an additional sheet if necessary

Anticipated improvement in circumstances
Please indicate below if you expect promotion or any other significant improvement in your circumstances in the foreseeable future.

All Dependent Children
Please include details about any other children including those in further education. If there are more than 4 children please give details on a separate sheet.

	1	2	3	4
First name				
Gender				
Date of Birth (dd-mm-yy)				
Name of current school, college or university				
Please state whether fee-paying or state				
Please state whether day-pupil or boarding				
Annual school or other educational fees (excluding extras)				
School extras				
Amount of fees shown is covered by:				
Scholarships, Bursaries or other allowances given by school				

Assistance from any other sources, eg grandparents, step-parents, godparents, trusts, charities, etc				
Please specify source:				
Other Dependants Please give details of any other dependants and how much you contribute towards their care or upkeep				
Additional Information				
Holiday Profile: please outline your and your child's/children's foreign and UK holiday profile including costs over the last two years and any plans you have in place for holidays in the next 12 months.				
Further support: Are grandparents, other extended family members, or significant other relevant persons in a position and subsequently willing to assist with fees?				
Reason for the application: Please give details of the circumstances which have led to this application and whether you envisage circumstances changing so that you will be in a position to pay full fees in the future and when?				

Supporting Documentation

Please enclose copies of documentary evidence in support of the figures disclosed above as indicated. Applications are strengthened if full documentation is provided, and weakened if it is not. Originals will not be returned so please provide copies.

In respect of the candidate: A full (unabridged) birth certificate (for new pupils only)

Declaration

Community Supported funding application:

Full name of each child	Class from September	Fee due:
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1 st child		
2 nd child – 10% sibling discount		
3 rd child – 25% sibling discount		
4 th child – 35% sibling discount		
Total fees due:		

Community supported funding requested	
Proposed financial contribution by the applicant/s	

In submitting this application for Community Supported Financial Assistance:

1. I/we recognise that the school does not have sufficient funds to provide school fee assistance to all those who apply and it is, therefore, possible that the school may not be in a position to support our application and will not make an offer of a place at St Paul's; and
2. I/we accept that the school reserves the right to withdraw the offer of a place at St Paul's in respect of your child(ren) in any of the following circumstances:
 - a. If, after reviewing the application, the Finance Committee does not make an offer of financial assistance and considers that I am/we are not in a position to afford the fees; or
 - b. If the school reasonably considers that I/we have fraudulently, knowingly or recklessly provided incomplete or false information in connection with my/our application; or
 - c. If, in the school's opinion, I/we can afford to pay the fees but have been opportunistic in applying for assistance. The school takes a sceptical view of such applications given the number of parents/carers/guardians in genuine need and it may have a detrimental effect on future applications I/we make.
3. I/we confirm that we have made a complete and accurate declaration of our current income and expenditure and assets and liabilities in this application.
4. I/we understand that if we are offered community supported financial assistance and accept that award the following terms and conditions will apply between myself / us and the school:
 - a. any assistance is subject to annual review and I/we must complete an updated application and supporting evidence by 28 February;

- b. I/we must report immediately any significant change in the financial position declared on this form;
- c. the assistance may be withdrawn or reduced if:
 - I/we act in breach of the school's Parent Handbook as may be amended from time to time; or
 - I/we fail to return the annual declaration of our financial circumstances by the return date indicated; or
 - I/we fail to produce any additional information required by the school to evidence our financial circumstances; or
 - In the opinion of the Head Teacher my/our child's attendance or behaviour no longer merits the continuation of the assistance;

Signature(s):	
Parent /Carer /Guardian 1	Parent /Carer /Guardian 2 (where applicable)
Date	Date