



HAMILTON COLLEGE

Governors' Bursaries Scheme 2010-2011

Declaration of Income and Application for Assistance with Tuition Fees.

PLEASE READ THE ATTACHED NOTES CAREFULLY AND THEN COMPLETE
THE FORM IN BLOCK LETTERS USING BLACK INK

THE INFORMATION ON THIS FORM WILL NOT BE PROCESSED ELECTRONICALLY AND IS SUBJECT TO THE TERMS
OF THE DATA PROTECTION ACT 1998

CHILD'S FULL NAME _____		DoB _____	
Full name of Mother _____			
Full name of Father _____			
Child's present address:		Address for correspondence (if different):	
_____		_____	
_____		_____	
Post Code _____		Post Code: _____	
Father's telephone No. Home: _____	Mother's telephone No. Home: _____		
Business: _____	Business: _____		
Mobile: _____	Mobile: _____		

DECLARATION

After you have read Notes 1-4 carefully, both parents should sign the following declaration (or see below):

1/We declare that to the best of my/our knowledge and belief, all the particulars here submitted are true and contain a full statement of my/our income from all sources during the periods shown. 1/We understand that the provision of false information may lead to my/our child being disqualified from assistance under the bursaries scheme.

Signature: Father _____ Date _____

Mother _____ Date _____

If the above declaration is signed by only one parent, please state the reason below.

If divorced or separated you may be asked to provide further information.

THIS FORM MUST BE RETURNED BY NO LATER THAN 23rd JANUARY 2010.

FAILURE TO MEET THE DEADLINE MAY RESULT IN REFUSAL OF THE APPLICATION.

PLEASE RETURN TO: RESOURCE MANAGER, HAMILTON COLLEGE.

DETAILS OF PARENTAL INCOME

1. **PARENTS.** Please complete in accordance with the guidelines given in the notes.

a. Name of Father _____ Unemployed Employed Self Employed

b. His profession, business or Trade _____

c. Name and address of his employer or address of business _____

d. Is he a Director of this Company? Yes No

e. If yes, please state proportion of each class of shares you hold _____

f. Name of Mother _____ Unemployed Employed Self Employed

g. Her profession, business or trade _____

h. Name and address of her employer or address of business _____

i. Is she a Director of this Company? Yes No

j. If yes, please state proportion of each class of shares you hold _____

2. **Do you have any investment/insurance plan specifically to pay school fees?** Yes No

If yes, please state amount to be paid in school year 2010-2011 £ _____ and enclose documentary evidence.

3. **Verification.** Note 11 explains that documentary evidence must be enclosed in support of the income figures in section 5 below. Please tick those which you are enclosing. **Where the appropriate document is not available**, please enter the date by which you will be able to produce it.

P60 2008-2009 Inland Revenue Self-assessment return 2008-2009

March Pay Advice or other verification Copy of business accounts for the latest financial year
of Superannuation or pension contributions in 2008-2009

Other (please specify) Copy of most recent pay slip for each parent

The school reserves the right to seek any other documentary evidence in support of the income figures submitted which it deems necessary.

4. **CHANGE OF CIRCUMSTANCES**

You must advise of any significant changes in circumstances occurring in the current financial year.

5. **PARENTS' INCOME:** Please complete the table below showing income from all sources, before Deduction of tax, for the financial year 2008-2009 (ie 6 April 2008 to 5 April 2009). Enter amounts in whole pounds or NIL in all places where applicable. Parents must provide copies of documentary evidence for all income declared in this section

Please refer to Note 5 onward		2008-2009 Actual	FOR SCHOOL USE ONLY
a. Earned Income	Father _____		
	Benefits in kind _____		
	Mother _____		
	Benefits in kind _____		
b. Superannuation Contributions if not included above	Father _____		
	Mother _____		
c. Additional Voluntary Contributions if not included above	Father _____		
	Mother _____		
d. Dividends from employment in a private company	_____		
e. Any other income not included above (e.g. investment income)	_____		
6. OTHER DEPENDANT CHILDREN - Allowance will be made for each dependant child under 16 years of age (18 if still in education). Please provide evidence e.g. child benefit document.			
Name	Date of Birth		
_____	_____		
_____	_____		
_____	_____		
7. FOR SCHOOL USE ONLY			
		TOTAL	
		_____	_____

RESOURCE MANAGER'S SIGNATURE _____ DATE _____

Details of Monthly Expenditure

Please complete the details below

	Net Monthly Income	Amount Payable per month
Net monthly salary (father)	<input type="text"/>	
Net monthly salary (mother)	<input type="text"/>	
Other income	<input type="text"/>	
Mortgage/rent		<input type="text"/>
Groceries		<input type="text"/>
Council Tax		<input type="text"/>
Gas/electricity		<input type="text"/>
Telephone/ Television		<input type="text"/>
Insurance		<input type="text"/>
Petrol		<input type="text"/>
Clothing		<input type="text"/>
Childcare		<input type="text"/>
Credit cards		<input type="text"/>
Loan repayment		<input type="text"/>
Maintenance		<input type="text"/>
Any other (please specify)		<input type="text"/>
Totals	<input type="text"/>	<input type="text"/>

HAMILTON COLLEGE GOVERNORS' BURSARIES
NOTES FOR PARENTS ON COMPLETING FORM FOR SCHOOL YEAR 2010-2011

These notes are provided for the guidance of parents completing the declaration of income and application form for the Governors' Bursaries Scheme. The notes cover a variety of circumstances but if you have difficulty answering any of the questions, please consult the school. The Application Form must be returned by the date shown. Failure to meet the specified deadline may result in refusal of the application.

DECLARATION CONCERNING VALIDITY OF INFORMATION

1. Parents are reminded that if false information is knowingly or carelessly provided in any particular, the school may disqualify the child from benefits under the scheme.
2. The declaration on the front of the form should be signed by both parents of the child for whom application is made, or if only one parent signs the reason for that should be given (eg divorce, separated, deceased or living overseas).
3. Under normal circumstances parents will be assessed on Income in the Financial Year 2008-2009. However provision may be made on the basis of the current year's income in cases where significant and unforeseen changes in family circumstances occur.
4. **Investments or Insurance Plans for School Fees**
Where a parent has an investment/insurance plan which is **specifically** for the payment of school fees, then the amount to be declared is amount payable under the plan for the academic year for which the application is being made, ie 2010-2011.

If the investment/insurance plan covers the full cost of the tuition fees then the pupil is not eligible for a Governors' Bursary

INCOME

5. Actual income should normally be declared for the financial year ending April 2009. Persons who normally use an accounting year other than the "tax year" ending 5 April should state this fact and give the dates to which income declared refers. (In these cases, the previous financial year would be the accounting year which ended before 5 April 2009).
6. As a general principle, gross income before tax should be declared. Income from **ALL** sources must be included. In **ALL** cases income arising outside the UK should be included. **NO DEDUCTIONS** should be made in respect of allowances made for tax purposes - specifically: personal allowances; superannuation etc contributions; donations direct to charities; mortgage interest; covenants; and income from abroad. The amount to be declared should include any amounts received as profit related pay or by virtue of a salary surrender scheme.
7. The amounts quoted for **earned** income should include:
 - a. the gross amount of salaries and wages and superannuation, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay;
 - b. profits from a business or profession - at the amount of **gross** income as shown in a self-assessment return or as agreed by HM Inspector of Taxes for the year in question, (deductions should be made only in respect of capital allowances, losses and stock relief; the amount of any balancing charges or stock relief recovery charges should be included);
 - c. benefits in kind (eg free or subsidised housing, meals or cars) at the amount agreed for tax purposes.
8. If parents enter an amount for earned income at section 5(a) which is net of employee's superannuation or other pension contributions paid during the year, the total of these contributions should be entered at section 5(b). This should include additional voluntary contributions. Separate documentary evidence of those contributions will also be required (see Note 11).
9. Income from the letting or sub-letting of **property** should be declared - at the amount of the **net** profit agreed with HM Inspector of Taxes.

10. Amounts entered under **any other income** should include any sums received as redundancy payments, “golden handshakes” etc. However the following will not be included in the calculation of relevant income:
- a. redundancy payments up to £30,000. If payments exceed that amount, £30,000 will be deducted for this purpose;
 - b. capital gains up to £9,200 (for each parent);
 - c. any amount paid in respect of foster children; and
 - d. the amount of any custodianship allowance paid under the Children Act 1975 or any similar allowance paid to parents by a local authority under the Children (Scotland) Act 1995.

VERIFICATION

11. The following documentary evidence of the earned income figures entered in section 5 of the form must be enclosed when the form is returned to the school;
- a. **Where income is derived from salary, wages, etc** - a copy of Form P60 (or similar document) supplied by employers at the end of the financial year. Where the P60 only shows taxable pay net of superannuation or other pension contributions, evidence of those contributions is also required; this could be a copy of the parent’s last March pay advice or other verification provided by an employer.
 - b. **Salaried directors of private limited companies** - a form P60 and an appropriate self-assessment return using the supplementary pages for employment.
 - c. **Where a parent is self employed** - a copy of the completed self-assessment return made to Inland Revenue or a copy of the audited business accounts for the financial year 2008-2009 or for the business accounting year which ends in that financial year.
 - d. **Benefits in kind** - should be shown as an amount ie the figure on which they are taxed. This will be found on an appropriate Notice of Coding issued by Inland Revenue, or on a form P11D (or P9D) issued by an employer.
 - e. **Pension Salary Sacrifice** - should be verified by means of a letter provided by an employer which should set out details of any income received as profit related pay or by virtue of salary sacrifice scheme.

Parents must provide Documentary Evidence of all Income Figures entered in section 5. Failure to disclose this information may result in the refusal of a bursary.

THE INFORMATION PROVIDED BY APPLICANTS WILL NOT BE RECORDED/PROCESSED ELECTRONICALLY AND IS SUBJECT TO THE DATA PROTECTION ACT 1998