



Guidance notes for Bursary & Financial Aid applications

These notes are provided for the guidance of parents completing an application for financial support. Please read them before completing the form. If you have difficulty answering any of the questions, please consult the Finance Office.

Moon Hall Schools Educational Trust reserves the right to seek any other documentary evidence in support of the income and asset figures submitted and to make enquiries which it deems necessary.

All financial values should be shown in £Sterling.

DECLARATION CONCERNING VALIDITY OF INFORMATION

1. You must provide details of your actual income, capital assets and expenditure with the necessary supporting documentation as indicated on the form.
2. All persons with parental responsibility (see note 3 below) for the child must sign the declaration at the end of the form for whom the application is made, or if only one parent signs the form, please state the reason for the other parent not signing.

DEFINITION OF PARENTS

3. The person(s) about whom details should be given on the form, and their income declared is/are as follows:
 - (i) the 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
 - (ii) 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
 - (iii) If parents are separated or divorced before or whilst their child attends the School, both mother and father will be required to complete and sign the application form. *In certain circumstances, separate forms may be completed and advice should be sought from the Finance Office;* or
 - (iv) where the parents are separated or divorced and there is a Court Order prohibiting a parent from entering the matrimonial home, or it is not reasonably practicable to find one of the parents, the parent who has actual custody of the child and his or her partner must complete the form; or
 - (v) the child's guardian appointed and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or

For simplicity, any male parent, step-parent, guardian or partner as defined above will be referred to as "father" and any female parent, step-parent, guardian or partner as "mother".

SECTION D – COURT ORDER

4. Where a parent is required by a Court Order, or a legal binding separation agreement (eg 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 (eg Deed of Separation) to pay part of the school fees, will be used to calculate any bursary 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 is required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a bursary. 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.

SECTION E – INSURANCE POLICIES FOR SCHOOL FEES

5. Where a parent has an insurance policy which is specifically for the payment of school fees, the amount payable under the policy for the academic year for which the application is being made should be declared. If the insurance policy covers the school fees in full then the student is not eligible for a bursary. 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 child.

SECTION G and H – INCOME

6. Please declare actual income arising in the tax year 2017/18 in section G and, if necessary, estimated income for the tax year 2018/19 on the form in section H. The declarations must include all income arising in the relevant tax year for those who meet the definition of ‘parent’ given in note 3 at the time the form is signed.
7. It is acknowledged that self employed parents may not have details of actual income for the tax year 2017/18 available before the deadline for submission of the form depending on when accounts are filed. In such cases you may give estimates and indicate on the form when the proof of actual income will be available. You will be required to submit this information once it is available.

In the case of self-employed persons, assessable income for any tax year is taken as that assessed by HM Inspector of Taxes for the same tax year. This will generally be income arising in the accounting year ended in the tax year concerned.

8. Please note that declarations of earned income includes:
 - (i) Gross salaries and wages, including earnings from part-time employment, bonuses, commission, statutory sick pay and statutory maternity/paternity pay
 - (ii) “Benefits in kind”, for example company cars, private medical insurance, free or subsidised accommodation, at the amount agreed for tax purposes
 - (iii) Social security benefits (details should be entered in section I)
 - (iv) Any income from letting or sub-letting of property (details should be entered in section K)
 - (v) Maintenance payments or separation allowances received under a court order or separation agreement or arrangements made with the Child Support Agency. You should enter the amount required to be paid in the relevant tax year, irrespective of the amount actually received.
 - (vi) Amounts declared as ‘any other income’ should include capital gains, ‘golden handshakes’, ‘windfalls’ from, for example, building society conversions etc.