



Financial Assessment Form, 2019-20
For families wishing to request financial assistance (Community Assisted Places)

To be returned by: Monday 29th April 2019

Parent(s) Name(s).....

Only fully completed forms will be considered. Please complete ALL boxes. Please respect the limited time available to our members of staff. Contact Admissions or Finance if you are unsure how to complete the form.

- South Devon Steiner School offers a limited number of Community Assisted Places.
- These places are afforded by those who commit to paying the full school fees.
- The reality is that these places are currently also afforded by the low salaries paid to members of staff and our limited ability to develop the grounds and facilities. In other words, there is a price to pay for the financial assistance we offer. We ask you to consider this carefully.
- By completing this form you are entering into a mutual and strict non-disclosure agreement with South Devon Steiner School. You may not share the details of the agreement and we will treat your information as confidential.
- Your application will be reviewed by the Senior Leadership Team together with the Finance Manager according to the rules defined by the School's Council of Trustees.

The form starts here:

Below is the school fee level for each year group per term.

	Kindergarten	Classes 1 to 7	Classes 8 to 12
Eldest	£1,720.00	£2,290.00	£2,800.00
Siblings	£1,500.00	£1,950.00	£2,370.00

Enter first name(s) of your child/children and the full school fee amounts that would apply to them. **It is then imperative you enter the proposed school fee for each child for each term in the proposed school fee boxes.** You may want to consider what you can afford per month first to work out your termly fee.

	Childs Name	Class in 2019-20	Full School Fees per term £	Proposed School Fees per term £
Eldest:				
2 nd (sibling rate):				
3 rd (sibling rate):				
4 th (sibling rate):				
5 th (sibling rate):				
Total school fees per term £				

I wish to defer part or all of the difference	YES	NO
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Family details			
Name(s) of parent(s) or carer(s)			
Address			
		Email(s):	Phone(s):
Please list below the children in your care even if some are not intending to be at this school.			
Name	Age	Class from Sept 2018 (for this school)	School or activity (if not this school)

Income from employment and self-employment		1 st earner	2 nd earner
How many hours a week, on average, are you in paid work?		hrs	hrs
Are you employed, self-employed or both? (Please circle)		Employed	Employed
		Self-employed	Self-employed
		Both	Both
Please give your <i>gross</i> pay (before tax and other deductions) from employment for the past year (including payments for casual work)		£	£
Please give your <i>net</i> pay (after tax and payslip benefits)		£	£
If you are self-employed or in business , please give approximate figures for the last twelve months and attach a copy of your latest accounts	turnover	£	£
	profit (before tax)	£	£
Please give the approximate annual value in money of any additional benefits or payments in kind you receive (e.g. a company car)		£	£
If your ability to take paid work is limited (e.g. for health reasons or because of child care), please give details:			
Is your income expected to change significantly in the next twelve months? If so, please give details:			

Other family income		Monthly	Annually
Please give the amount of any income you receive from investments or savings		£	£
Please give the amount of any income you receive from maintenance payments or from family or friends		£	£
Please give the amount of any state benefits you receive	Housing benefit	£	£
	Council tax benefit	£	£
	Child tax credit	£	£
	Working person's (family's) tax credit	£	£
	Disabled person's tax credit	£	£
	Child benefit	£	£
Other benefits (please specify)		£	£
Please give the amount of any rental income you receive (e.g. lodgers, students, holiday lets, paying guests, ancillary accommodation, investment property)		£	£
Please give the amount of any income you receive from sources not mentioned above		£	£
Does your family have any significant debts (apart from a mortgage)? If so, please give the amount and the approximate annual interest on the loan(s). Please also say below what the debt is for (e.g. student loan, car purchase).		Debt	Interest
		£	£

Housing			
If you are living in rented accommodation, what is the current rent per year?			£
Do you own a home?	YES	NO	If you do own a home, please give the information requested below.
Please bear in mind that reduced contributions from home-owners, are only likely to be acceptable in exceptional circumstances. Deferment will be considered in cases where it is impractical to access the capital value of property in the short term. In such cases the school may ask for a charge over the property to secure the amount owed.			
Would you be willing to give the school a charge over your property?		YES	NO
Estimate of present value	How much is the mortgage?	What is your monthly payment?	How much is your council tax per year?
£	£	£	£
Do you own other properties?	YES	NO	If YES, please give the following information for each -
Estimate of present value	How much is the mortgage?	Rental income (if any)	Rental expenses
£	£	£	£
£	£	£	£

Other expenses		
If you pay maintenance for a former partner(s) or children not living with you, please give the amount per year	£	
If you have educational expenses for children who are not at the school please give the amount per year	£	
Other information		
Have you asked anyone in your family (e.g. the children's grandparents) for financial help with the children's education?	YES	NO
If YES, what amount, if any, have they been able to contribute per year?	£	
If they are not already contributing, are the children's grandparents aware of your application for a community assisted place?	YES	NO
Do any of the children who are at this school have a second parent who lives apart from you?	YES	NO
If YES, does the other parent help with the cost of the education?	YES	NO
What percentage, approximately, do they pay at present?	%	
Do you anticipate any inheritance in the near future?	YES	NO
If YES, how much do you anticipate this might be?	£	

Investments and possessions		
Please give the amount of any cash savings you have. Include the proceeds of any house sale unless they have already been spent on another house	£	
If you have other investments, such as stocks and shares, please give the approximate cash value	£	
Please list your cars:	Approximate value	
Do you own any other assets (apart from houses and business assets) that are worth more than £2,000 per item (e.g. boats, caravans, works of art)? If so please list them below with their approximate value		
	£	
	£	
If you own a business, please give the value of your business assets and liabilities. Please attach a recent balance sheet if possible.	Business assets	Business liabilities
	£	£

Signature and declaration	
The above information represents a complete and accurate record of my/our financial situation. I/we agree to notify the school of any significant changes as they occur. I/we accept that if reduced fees are accepted on the basis of information that is not correct, the acceptance may be withdrawn and the amount of any reduction already allowed may be reclaimed. I/we acknowledge that acceptance of reduced fees or deferment is for one year only.	
Signed:	Signed:
Date:	Date:

Please return the completed application to the Finance Office by Monday 29th April 2019. The address is: Finance & Admissions Office, South Devon Steiner School, Dartington, Totnes, Devon, TQ9 6AB or email finance@steiner-south-devon.org.