

Reduced Fee Applications School Year: 2023/24



Important Information

Please complete all questions; the information is needed to be able to consider your application. Continue on a separate sheet of paper if there is not enough space.

All figures given on the form **must** be accompanied by supporting documentation. Details of what should be provided can be found overleaf. If you cannot provide this, please explain in detail in your personal statement.

Incomplete applications and applications without supporting documentation will not be considered.

All offers of financial assistance have the following conditions:

- 1. Your child/children maintain a good attendance record, make good progress and act in accordance with the school's expectations relating to behaviour.**
- 2. The financial contributions agreed remain up to date.**
- 3. The details of the agreement remain strictly confidential.**

It is expected that all families applying for a reduced fees will have already considered how they can increase their income and reduce their expenditure, and will have investigated other means of funding the school fees.

Reduced Fees are not normally granted to families who move to South Devon on a speculative basis without having first secured a source of income, or who choose for lifestyle reasons to take up or remain in a situation in which they cannot afford to pay.

When a child in receipt of a reduced fees leaves the school any deposit(s) held by the school will be retained by the school.

Where a child's parents are no longer living together, we normally require both parents to submit financial information prior to granting a reduced fees. This may be done together, or on separate forms. If this is not possible for any reason, this should be explained in your personal statement.

All reduced fees are re-assessed on an annual basis; please return this application by **5pm on Friday 28th April 2023.**

Criteria Applied to Reduced Fee Applications

The following criteria will be applied to all requests:

- 70% of the total fees
- 30% of the household total income

Whichever is highest will be the minimum amount the school will accept as fees

You will be informed in writing as to whether your application has been successful.

NB: Reduced Fees cannot be granted to families who have savings over £10,000

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Evidence required

The following supporting documentation should be included with your application. If you are unable to provide any of the following documents, you should explain why in your personal statement. If any figures in your application do not match figures in the supporting documentation, you should explain why in your personal statement.

We recommend that you provide photocopies rather than original documents. If you would like the supporting documents returned, please include a stamped, addressed envelope. None of the supporting documents are retained on file. If you do not include a stamped address envelope, the supporting documents will be destroyed once the reduced fees group have made their decisions.

1. Three consecutive months of recent statements for all bank accounts, savings accounts, credit cards, and loans (printouts from internet banking are fine).
2. Evidence of income:
 - a. If employed, your most recent pay slip, or
 - b. If self-employed, your most recent tax return, or
 - c. If unemployed, confirmation of entitlement to benefits.
 - d. If retired, confirmation of income from pensions.
3. If relevant, official confirmation of housing benefits, tax credits, child benefit, etc.
4. Evidence of housing costs:
 - a. If renting, tenancy agreement or letter advising of increase in rent, or
 - b. If buying, your most recent mortgage statement.

Declaration

I/we certify that all the details in this application and any additional papers I/we have attached are correct to the best of my knowledge.

I/we understand that all information given will be confidential.

I/we understand that the school has limited resources and cannot guarantee that my application will be successful.

I/we understand the conditions on which any Reduced Fee award is made, and that the Reduced Fee may be withdrawn by the School in the event of a condition not being met.

I/we confirm that should any of my circumstances change positively during the course of the academic year that I/we will inform the School Business Manager at South Devon Steiner School without delay.

Signed.....

Date.....

Signed.....

Date.....

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Name of Parent(s) Guardian or Carer

.....

Address

..... Post Code.....

Email Address

Telephone Day.....

Evening.....

Mobile.....

Children's Details

Name Class.....

Name Class.....

Name Class.....

Name Class.....

Home address of Children if not living with you

.....

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HOUSEHOLD INCOME	AMOUNT (£) PER MONTH	FOR OFFICIAL USE ONLY
Average net earnings Self		
Partner		
Benefits / Tax Credits (say what sort)		
Pensions		
Maintenance you receive		
Contributions from other adults (grown up children, lodgers, etc.)		
Other income (give details)		
TOTAL INCOME		

* To convert weekly amounts to monthly, multiply by 52 and divide by 12

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HOUSEHOLD EXPENDITURE	AMOUNT (£) PER MONTH	FOR OFFICIAL USE ONLY
Mortgage		
Rent		
Council Tax		
Insurance (car home life other)		
Gas Electricity Water		
Telephone internet etc		
Travel costs Petrol etc		
Housekeeping (food etc)		
Clothing		
Holidays		
Other essential payments describe below		
1		
2		
3		
4		
TOTAL EXPENDITURE		

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Debts	AMOUNT (€) PER MONTH	FOR OFFICIAL USE ONLY
Mortgage		
Bank Loans		
Overdraft		
Credit card debts (include store cards)		
Lender Outstanding balance		
Lender outstanding Outstanding balance		
Lender Outstanding balance		
Other Debts		

Assets	Estimated value	FOR OFFICIAL USE ONLY
Property (house flat etc)		
Stocks and shares		
Cash and bank balance		
Savings		
Other Major assets (give details)		
Other Major assets (give details)		
Other Major assets (give details)		

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Reduced Fee Requested

	First Child Annual Fee	70% of Annual Fee	Sibling Annual Fee	70% of Annual Fee
KG	£6657	£4,659.90	£5829	£4080.30
Lower School (1-5)	£8895	£6226.50	£7578	£5304.60
Uplift payment (6)	£9957.00	£6969.90	£8640	£6048
Uplift payment (7)	£9957.00	£6969.60	£8640	£6048
High School (6-12)	£10878	£7614.60	£9123	£6386.10

Name of Child	Class	70% of Fee
		£
		£
		£
		£
	Total	£

Total Income: £

30% of Total income: £

Example 30% of £25,000 = £7,500 (£25,000 divide by 100 multiply by 30 = £7,500)

I/We are requesting a reduced fee payment of £
2023/24 academic year.

for the

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PERSONAL STATEMENT

This is an opportunity to add any further information to support your application. For example, you may wish to tell us:

- What other sources of funding you have investigated;
- How you have tried to maximize your income and reduce your outgoings;
- An explanation of any unusually high expenditure you have listed;
- Whether your situation is expected to be long- or short-term;
- Details of any recent change in your circumstances;
- your association with, and commitment to Steiner education and/or Anthroposophy;
- Any special factors of which you think we should be aware.
- What plans do you have to improve your situation.