

MONTAGU AWARD

1. Pupil Information				
<i>First Name</i>	<i>Middle Initial</i>		<i>Surname</i>	
<i>Date of Birth</i>	<i>Year of Entry</i>	<i>Term</i>	<i>Nationality</i>	<i>Religion</i>

2. Parental Information			
	<i>Father/Step-Father</i>	<i>Mother/Step-mother</i>	<i>Notes</i>
<i>First Name and Initial</i>			2
<i>Surname</i>			
<i>Employment state</i>			2a
<i>Occupation</i>			
<i>Employer/business name</i>			
<i>Business address</i>			
<i>Are you a Director or Proprietor?</i>			2b
<i>If "Yes" what percentage do you each own?</i>			
<i>Home Tel No.</i>			
<i>Work Tel No.</i>			
<i>email</i>			

3. Principal Residence			<i>Notes</i>
<i>House name/number</i>			
<i>Road</i>			
<i>Town</i>			
<i>Postcode</i>			
<i>Market Value</i>			3a
<i>Pending planning applications?</i>			3b
<i>If "Yes" how much will value increase</i>			3c
<i>Amount of mortgage</i>			3d

4. Income	<i>Father</i>	<i>Mother</i>	<i>Notes</i>
<i>Gross Salaries (Before tax, pension, etc deducted)</i>			4a
<i>All other benefits (Medical, car etc)</i>			4b
<i>Profits from business, farm, profession etc</i>			4c
<i>Gross Pension (All pension income)</i>			4d
<i>Interest (Banks, Building Society etc)</i>			4e
<i>Dividends (Shares & investments)</i>			4e
<i>Working Tax Credit</i>			4f
<i>Child Benefit</i>			4f
<i>Separation/Maintenance Allowance Income</i>			
<i>Court Order/Separation Agreement Fee Income</i>			4g
<i>Housing Benefit</i>			
<i>Other Government Assistance</i>			4f
<i>Benefits in kind (Free housing etc)</i>			4h
<i>Assistance from family/charity(not fees)</i>			
<i>Trust Fund income</i>			
<i>Rents and lease income</i>			4i
<i>Any Income received overseas</i>			
<i>Any other Income</i>			

5. Outgoings			<i>Notes</i>
<i>Tax payable on earned Income(including deducted at source)</i>			5a
<i>Tax payable on unearned Income(including deducted at source)</i>			5a
<i>National Insurance</i>			
<i>Pension deduction</i>			5b
<i>Principal residence Mortgage per annum</i>			5c
<i>House Rent/Lease per annum</i>			5d
<i>Other loan Interest per annum (Amount & Reason)</i>			5e
<i>Other loan Interest per annum (Amount & Reason)</i>			5e

6. Capital Assets	<i>Father</i>	<i>Mother</i>	<i>Notes</i>
<i>Building Soc/Bank Deposit</i>			6a
<i>Equity Share/Gov Stocks</i>			6b
<i>PEPS, TESSA, ISA, NSI</i>			6b
<i>Cars</i>			
<i>House Contents</i>			
<i>Cash at bank & elsewhere</i>			6a
<i>Any other asset of value over £5,000 (boat etc)</i>			
<i>Market value of other property in UK or abroad</i>			6d
<i>Market value of any equity assets or cash in UK or abroad</i>			
<i>Net worth/value of any business or partnership that you own</i>			6c
<i>Market value of insurance policies maturing in next 5 years</i>			
<i>Assets held in trust for you or your children</i>			
<i>Total Assets held in children's names exceeding £5,000</i>			
<i>Redundancy, employment separation or lump sum payments in last 2 or next year</i>			
<i>Any other asset affecting your Total Worth not shown above.</i>			

7. Capital Liabilities	<i>Father</i>	<i>Mother</i>	<i>Notes</i>
<i>This section should show the level of capital borrowing charged against the assets in Section 6.</i>			
Asset & Lender	Amount	Amount	

8. Dependent Children	Applicant	2	3	4	Notes
Forename					8
Date of birth					
School/College					
Boarding or Day					
Annual basic school or other educational fees (NOT extras)					8a
Compulsory additional charges					
Amount of fees met by:					
Scholarship/bursary, allowances					
Local Education Authority					
Advance Payment Scheme					
Services/Diplomatic/Company Education allowance					8b
Education Insurance Policy					8c
Assistance from relatives, trusts, settlements etc					8d

9. Other Dependents <i>Please give full details</i>	Notes

10. Any other relevant information <i>(continue on separate sheet if necessary)</i>	Notes

11. Verification <i>Please enclose as much of the following as possible</i>						Notes
P60	<input type="checkbox"/>	Schedule D Self employment income from accountant	<input type="checkbox"/>	Mortgage Statement	<input type="checkbox"/>	
P11D	<input type="checkbox"/>	Company Report & Accounts for last 2 years	<input type="checkbox"/>	Contents Insurance	<input type="checkbox"/>	
Jan & March Pay Slip	<input type="checkbox"/>	Property Valuation	<input type="checkbox"/>	Investment valuation	<input type="checkbox"/>	
HMRC Tax Calculation	<input type="checkbox"/>	Current A/C Statements	<input type="checkbox"/>			

12. Declaration

After having read the attached notes, the following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete declaration of our/my income and assets.

We/I understand that if we/I are/am offered an Award for our/my child and accept a place for him/her at the school:-

- a) our/my child's fees account with the School will be credited termly with the amount of the Award;
- b) we/I understand that any award or grant is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated;
- c) undertake to report immediately any material change in the financial position declared;
- d) the Award may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
 - i) there is a breach of the School's Terms and Conditions attached to the acceptance of a place for our/my child at the school;
 - ii) we/I have knowingly and/or recklessly provided false information, or not disclosed relevant information;
 - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iv) we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances;
 - v) there is in the view of the Head either unsatisfactory work or conduct which fails to meet the levels of excellence required of Scholarship;
 - vi) the School's resources are insufficient to maintain the level of award.

Father		Date
Mother		Date

If there are others responsible for the upbringing of the pupil, they should also complete additional copies of the application. If only one person is able to complete the form, an explanation should be given below.

NOTES FOR GUIDANCE FOR COMPLETION OF MONTAGU AWARD APPLICATION FORM

St Gabriel's is committed to providing an inclusive education service which provides measurable Public Benefit. A significant part of that Public Benefit is achieved through financial help to families who would otherwise not be able to benefit from the school. The financial help is in effect provided by a majority of fee-paying parents paying a small margin on their fees which is used to assist others. In order to fairly assess the need for financial assistance and to provide assurance to the parents paying full fees, the questionnaire is necessarily intrusive and very detailed. Please be assured that the information you provide is kept privately by the Bursar and is dealt with entirely independently of your child's education. It is an aim of the school that there should be no differentiation between those receiving assistance and those who do not.

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

The School 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, including searches of the land registry, credit reference agencies and carrying out home visits.

All financial values should be shown in Sterling. References to Inland Revenue should include the relevant national Taxation Authority.

1. Pupil Information

A separate application should be rendered for each child.

2. PARENTAL INFORMATION

These are defined as:

- the natural 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
 - 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
 - the child's guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
 - the person with whom the child resides in accordance with either:
 - i. a subsisting residence order made under section 8 of the Children Act 1989; or
 - ii. any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
 - where a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
 - where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
 - If parents are separated or divorced before or while their child attends the School, both mother and father will be required to complete and sign the Application Form.
- a. Please state whether employed/retired/self employed/not employed. This is not used in assessing applicants but only to check the type of supporting information required.
- b. "Director" or "partner" relate to those who own part of the business, or who receive remuneration on a shared basis

3. PRINCIPAL RESIDENCE

In addition to taking account of all relevant sources of income, the school takes account of capital assets which includes the principal residence. In the normal course, there will be only one principal residence, but in the case of separated parents living independently both residences will be considered.

- a. The market value should be based upon an average for that property in that area.
- b. The applicants should indicate whether planning applications have been approved or are in preparation

- c. The applicant should make an estimate of the approximate increase (decrease) in market value likely to be brought about by approval of the planning application
- d. The mortgage outstanding on the principal residence

4. INCOME

- a. The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year.
- b. Taxable benefits in kind agreed with the Inland Revenue should also be shown (free or subsidised housing, meals, petrol, cars, etc) - at the amount agreed for taxable purposes.
- c. Profits from a business or profession - at the amount of GROSS income agreed by HMIT or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.
- d. Pension income should be shown gross
- e. All other Investment income (eg interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.
- f. All social security benefits received should be declared and type of benefit specified.
- g. Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees - 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 will be used to calculate any grant 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 grant. 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.
- h. Include free benefits in kind agreed by Inland Revenue as not subject to tax, eg representative occupation of house, free meals.
- i. Enter income from letting or subletting of property at the amount of the NET profit agreed with the Inland Revenue; and royalties and all other sources including entertainment and travel allowances etc.

5. OUTGOINGS

- a. Enter Income Tax and tax on unearned income SEPARATELY.
- b. Enter annual superannuation contribution of (if applicable) payments to other Pension Schemes by employee. If a Director/Partner/Proprietor, include all employer contributions in excess of £5,000 per annum
- c. Enter capital as well as interest payment on a mortgage for the principal residence.
- d. Enter either mortgage or rent for principal residence.
- e. Interest only not capital payment. Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

6. PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

- a. The capital sum of any monies on deposit with any bank, deposit taker or building society.
- b. Investments in stocks and shares, valued as near as possible to the date of submitting the application form

- c. If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- d. In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

7. PARENTS'/APPLICANTS' CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

8. DEPENDENT CHILDREN

Use the first column for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

- a. The figures to be inserted here refer to the current academic year.
- b. Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum.
- c. Insurance Policies for School Fees - If any insurance policy for the payment of school fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. 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 pupil.
- d. Where the child has any unearned income, eg interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

9. OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

10. ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant, eg a significant change in income or outgoings for the coming year.

11. VERIFICATION

Please provide sufficient documents to substantiate income, capital and expenditure

12. DECLARATION

In signing this declaration, applicants are certifying to the truth and completeness of the information provided.