



LOYOLA BURSARY – FINANCIAL ASSESSMENT

Name of Child	
Date of Birth	

Please enter your current earnings and expected income from all sources for this tax year.
Please state the annual figure in all cases.

1) INCOME

Earnings

- Gross salary
- Taxable benefits – as shown on form P11D
- Self-employed annual business profits
- Gross pension
- Widows pension
- State pension
- Other taxable state benefits, please name:

	Parent 1	Parent 2
	£	£
1a		
1b		
1c		
1d		
1e		
1f		
1g		

Gross investment income from:

- Building Soc./banks incl. ISA’s, PEP’s & TESSA’s
- Dividends (net amount received)
- Gross income from property
- Social Security benefits (inc. Child Benefits)
- Separation or Maintenance Allowance
- Court order for school fees amount
- Benefits in kind
- Capital Gains
- Gifts from family or friends
- Any other income not included in 1a to 1q above

1h		
1j		
1k		
1l		
1m		
1n		
1p		
1q		
1r		
1s		
Total 1		

Details _____

(Supporting information for any of the above may be requested)

Total Income

FINANCIAL ASSESSMENT FORM

2) EXPENSES/OUTGOINGS

		Parent 1	Parent 2
Tax payable on incomes declared above (inc. tax at source)	2a		
National insurance contributions	2b		
Pension and superannuation contributions	2c		
Mortgage payment (show capital element if applicable below)	2d		
Mortgage capital	2e		
Any other interest payable and state nature of loan on which paid:	2f		
Annual rent payable on principal residence	2g		
Council Tax	2h		
Water Rates	2j		
Electricity/Gas	2k		
Personal Expenditure	2l		
Maintenance & Alimony	2m		
Other (excluding Loyola School fees)	2n		
Total Outgoings	Total 2		
Excess of income over outgoings	Total 1 minus 2		

FINANCIAL ASSESSMENT FORM

3) ASSETS (where jointly owned please enter details in Parent 1)

		Parent 1	Parent 2
Approximate market value of all investments			
1) Building Society/Bank deposits	3a		
2) Equity investments, Government stocks	3b		
3) PEP's, ISA's and TESSA's	3c		
Approximate market value of main residence	3d		
Approximate market value of any other properties	3e		
Approximate market value of other possessions including house contents, car(s) etc.	3f		
Cash at banks or elsewhere	3g		
Approximate market value of any other assets, including properties at home or abroad. (Please specify and include the market value of any Insurance policies maturing in this tax year or within the next 5 years)	3h		
Net worth/value of any business which you own or share	3j		
Monies owed to you not yet received in respect of redundancy, employment separation or lump sum payments.	3k		
Sub-total Assets	Total 3		

4) CAPITAL LIABILITIES

		Parent 1	Parent 2
Please give details of any capital charges against the assets declared above			
Mortgage:			
1) Amount outstanding on main residence	4a		
2) Final payment date			
Other liabilities (please specify)	4b		
Sub-total Liabilities	Total 4		
NET ASSETS	Total 3 less 4		
Please indicate if there are any reasons why net assets cannot be utilised to pay school fees or to fund school fees (continue on a separate sheet)			

FINANCIAL ASSESSMENT FORM

5) DEPENDENT CHILDREN (if more than 4 please continue on a separate sheet)

		1	2	3	4
Forename	5a				
Date of birth	5b				
School/College	5c				
Boarding or Day	5d				
Religion	5e				
		£	£	£	£
Annual school or other educational fees (excluding extras or sundry disbursements)	5f				
Compulsory additional school charges	5g				
Amount of fees shown in 5e covered by:					
i) Government Assisted Places Scheme, Scholarships, Bursaries or allowances given by school	5h				
ii) Annual sum arising from capital repayment scheme	5j				
iii) Services/Diplomatic/Company Education Allowances (gross) (state whether sum has been included in gross salary at 3a)	5k				
iv) Annual sum arising from Educational Insurance Policies	5l				
v) Assistance from any other sources e.g. Grandparents, trusts, charities etc (please specify)	5m				
Annual income of child (if any)	5n				
Capital Value of Trust	5p				
OTHER DEPENDENTS					
ANY OTHER RELEVANT INFORMATION					

FINANCIAL ASSESSMENT FORM

VERIFICATION OF INCOME	Parent 1	Parent 2
Please enclose documentary evidence in support of the income figures in Section 1 (please tick those you are enclosing.		
i) P60		
ii) Copy of HMRC Self Assessment tax calculation		
iii) March pay advice		
iv) Independent Accountants confirmation of Schedule D income		
v) Report & Accounts for last 3 years		

VERIFICATION OF ASSETS	Parent 1	Parent 2
Please enclose documentary evidence of capital assets in Section 3 and tick those you are enclosing:		
i) Property valuation		
ii) Investment Portfolio valuation		
iii) Mortgage statement		
iv) Contents insurance		

Name of Applicant/s	
Signature/s & Date	