



# LOYOLA PREPARATORY SCHOOL

## FINANCIAL ASSESSMENT FORM

<b>Name of Child</b>	
<b>Date of Birth</b>	

Please enter below 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 societies/banks including ISA's, PEP's and TESSA's  
 Dividends (net amount received)  
 Gross income from property  
 Social Security benefits (inc. Child Allowance) not included in 1g  
 Separation or Maintenance Allowance  
 Is there a Court Order/Separation Agreement? If yes, please state annual amount received for school fees  
 Benefits in kind provided free by reason of employment  
 Capital Gains  
 Gifts from family or friends  
 Any other income not included in 1a to 1q above

Details \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

#### Total Income

1h		
1j		
1k		
1l		
1m		
1n	YES/NO	YES/NO
1p		
1q		
1r		
1s		
Total 1		

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**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		
<b>Total Outgoings</b>	Total 2		
<b>Excess of income over outgoings</b>	Total 1 minus 2		

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**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 principal 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 (current accounts only)	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		
<b>Sub-total Assets</b>	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 principal residence	4a		
2) Final payment date			
Other liabilities (please specify)	4b		
<b>Sub-total Liabilities</b>	Total 4		
<b>NET ASSETS</b>	Total 3 minus 4		
You should indicate if there are any reasons why net assets can not be converted or utilised to pay school fees or to fund school fees (continue on a separate sheet)			

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**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				
<b>OTHER DEPENDENTS</b>					
<b>ANY OTHER RELEVANT INFORMATION</b>					

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		

<b>Name of Applicant/s</b>	
<b>Signature/s &amp; Date</b>	