



**For school use (please tick):**

New applicant

Renewal

**Service required:**

Home visit

Zoom/Teams

**BURSARY ADMINISTRATION LIMITED**

on behalf of

**TOWER HOUSE SCHOOL CHARITABLE FOUNDATION**

## **BURSARY APPLICATION FORM**

**Confidential Statement of Financial Circumstances**

Please read the Guidance Notes at the end of this document before completing this form

### **ASSESSING YOUR APPLICATION**

The school reserves the right to make all decisions regarding your application for a Bursary, but employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to make the decision.

**PLEASE NOTE THAT NO APPLICATION WILL BE CONSIDERED UNLESS THE PROCESS AS DETAILED BELOW IS FOLLOWED.**

**IN MAKING THIS APPLICATION AND COMPLETING THIS FORM YOU WILL BE TAKEN TO HAVE CONSENTED TO THE PROCESSING OF PERSONAL AND FINANCIAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD OF THE APPLICATION AND ANY OTHER CHILDREN OF THE FAMILY, AND SENSITIVE PERSONAL**

**DATA RELATING TO THE APPLICANTS, THE CHILD AND ANY OTHER CHILDREN OF THE FAMILY.**

**PERSONAL, FINANCIAL AND SENSITIVE DATA RELATING TO THIRD PARTIES MAY NEED TO BE PROCESSED (IF YOU FEEL IT IS NECESSARY), AND YOU WILL NEED TO OBTAIN THE THIRD PARTIES' CONSENT BY ASKING THEM TO SIGN THIS SECTION OF THE APPLICATION FORM.**

## **BURSARY ADMINISTRATION LIMITED**

### **PRIVACY POLICY AND NOTICE**

#### **Introduction**

Bursary Administration Limited (BAL) has been registered with the Information Commissioner's Office (ICO) since 13<sup>th</sup> February 2009 and is currently registered as a Data Controller under the reference Z1647679 and acts both as a Data Controller and Processor on behalf of client schools as required. BAL will make every endeavour to abide by the principles and terms of the Data Protection Act 2018. BAL undertakes to take all possible care to protect Bursary applicants' (ie the families') and client schools' sensitive data.

The purpose of this policy is to outline BAL practices with respect to data collected from families who use BAL's website and provide personal (including sensitive) and financial data with regard to their applications to BAL's client schools for Bursarial support.

#### **Grounds for data collection**

BAL collects data in order to be able to contact applicants and then processes the data, which is provided to BAL as part of a Bursary application, in such a way as to provide a report to BAL's client, the school to which the application is being made, in order to help the Governors of that school make a decision regarding the Bursary application.

#### **Using BAL's website**

The only way BAL's website will collect data on a contact is if the contact chooses to send BAL a message through the 'Contact Us' page, which requests name and email address details. The Wordpress database, which the website uses, stores first and last name, the email address, and the message sent to BAL. The website also stores details of the web browser used, the pages which the sender viewed, and

the IP address from which the message was sent. The website does not run cookies for any user who is not able to sign-in to the website, which is no-one outside of BAL staff. The website will pass on the first and last name of the sender, the sender's email address and message onto BAL's email system, Office 365. When a contact uses BAL's website, he or she consents to this collection, storage, and transmission of data. The website and BAL's email system, Office 365, is stored securely on servers which are situated within the United Kingdom.

### **User Rights with regard to the website**

You may request to:

1. receive confirmation as to whether or not personal data concerning you is being processed
2. receive a copy of personal data you directly volunteer to BAL in a structured, commonly-used and machine-readable format
3. request rectification of your personal data that is in BAL's control
4. request erasure of your personal data
5. object to the processing of personal data by BAL
6. request to restrict processing of your personal data by BAL
7. lodge a complaint with the ICO

However, please note that these rights are not absolute, and may be subject to BAL's legitimate interests and regulatory requirements.

If you wish to exercise any of the above rights please contact Liz Moseley on [liz@schoolbursaryguide.com](mailto:liz@schoolbursaryguide.com)

### **Retention**

BAL will retain data collected from the website for as long as necessary to provide BAL's services, and as necessary to comply with BAL's legal obligations, resolve disputes, and enforce BAL's policies. Retention periods will be determined taking into account the type of data that is collected and the purpose for which it is collected, bearing in mind the requirements applicable to the situation and the need to destroy outdated, unused data at the earliest reasonable time.

### **Making an application**

When you make an application BAL will collect personal (including sensitive) and financial data:

- Name and date of birth of child(ren) of the application, and home address
- Full contact data of parents/carers making the application
- Employment details of parents/carers making the application

- Names and dates of birth of other dependent children, and schools attended for all children of the family, including Bursarial/grant/other fee support and/or scholarship details as appropriate
- Names of other dependents, for example grandparents
- Financial data for the parents/carers making the application, whether that be separately or jointly (separate parents/carers usually use different application forms). This will include data regarding income and expenditure, assets and liabilities.
- Contact and financial data for adults who hold or are considered by the client school concerned to hold a financial interest in the application, for example a second partner, or a grandparent who will support fees. It may be that full financial data for that person(s) will not be deemed necessary.
- Sensitive data, for example medical, social service involvement, but only as necessary to support an application. It is important to note that this may, out of necessity, be data regarding a third party as that situation may have a bearing upon the application.

Please note that BAL may use any publicly-available information (data) in order to provide as full a report to the client school as possible, but will not make a credit check upon any adult mentioned in the application, nor undertake any searches which would affect any adult's credit status.

#### **How BAL receives this data**

An application will be completed (either online or on paper) and sent either to the client school or directly to BAL as detailed at the bottom of the form. Supporting paperwork as required must be included.

If the Application Form and the supporting paperwork has been sent to the client school this will be scanned and forwarded to BAL using a document exchange system so that BAL may commence its work.

#### **Assessing your application**

BAL will contact you to make arrangements for a home visit or Zoom/Teams interview if this has been required by the client school. As there are time constraints for assessing applications BAL will offer two home visit/online appointments before referring the application back to the client school for further directions.

BAL will send its report on your application to the client school through a document exchange system and will then withdraw from the process unless the client school has any further enquiries it wishes BAL to make.

### **Data retention and security**

Any paper documents which BAL uses for the purpose of making its report to its client schools are stored in plastic wallets under lock and key. BAL undergoes the process of removing all papers held from storage once each month: these papers, which will include home visitors'/ assessors' handwritten notes, are scanned and then shredded securely using an authorised service. Scans are stored securely on memory drives which are not linked to the internet in any way, and are themselves stored securely under lock and key.

Any electronic data, whether it be held on BAL's system, a BAL computer (necessary whilst a report is in process), or a memory drive, is stored within the United Kingdom. Electronic data will be deleted after the expiration of four years, unless its retention is necessary to comply with BAL's legal obligations, resolve disputes, or enforce BAL's policies.

It will be appreciated that BAL home visitors/ assessors will need to transport papers/their laptop computers as they go about their daily work. These papers/computers are left out of sight in locked facilities if not in use, and the computers are passworded and encrypted. BAL uses multi-factor authentication to protect its computers (this means that if any person other than the recorded user of a BAL laptop tries to access it the recorded user will be contacted by electronic means, an app, and will be able to deny access to the laptop). It should be noted that home visitors/ assessors are not permitted to use their personal equipment for their work with BAL.

### **Applicant Rights**

You may request to:

1. receive confirmation as to whether or not personal data concerning you is being processed
2. receive a copy of personal data you directly volunteer to BAL in a structured, commonly-used and machine-readable format
3. request rectification of your personal data that is in BAL's control
4. request erasure of your personal data
5. object to the processing of personal data by BAL
6. request to restrict processing of your personal data by BAL
7. lodge a complaint with the ICO

However, please note that these rights are not absolute, and may be subject to BAL's legitimate interests and regulatory requirements.

If you wish to exercise any of the above rights please contact Liz Moseley on [liz@schoolbursaryguide.com](mailto:liz@schoolbursaryguide.com)

**Important points to note**

- BAL will only use applicants' data of any type for the purpose of assessing the application and making a report to the client school
- BAL will never release applicants' data, of any kind, to any person or body outside of the client school to which the applicant is applying. There is one exception to this, if the applicant has applied to more than one of BAL's client schools, in which case the report will be shared, but only with all parties' approval. In making this application and signing this form you are taken to have consented to sharing the report.
- If assessing separated parents/carers, BAL staff will never reveal any type of data of one parent/carer to the other
- BAL will never market its services to any applicant
- BAL will not knowingly collect data of any type from a minor without the prior and express consent of a parent or carer
- All BAL staff are required to sign confidentiality clauses when they commence working for the company, and are trained in matters of Data Protection and Security
- Any data breach of any type will be reported to the client school immediately, and contact made with the applicants as agreed with the school concerned. The breach will then be reported to the ICO in accordance with regulations.
- It should be noted that the report produced by BAL is the property of the client school and the ICO regards your report as confidential and exempt from the provision of Subject Access Requests

This Policy will be reviewed annually and amended as necessary.

The Data Protection Officer is Liz Moseley, who can be contacted on [liz@schoolbursaryguide.com](mailto:liz@schoolbursaryguide.com)

**I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:**

PARENT/CARER 1 Click or tap here to enter text.

PARENT/CARER 2 Click or tap here to enter text.

THIRD PARTY Click or tap here to enter text.

THIRD PARTY Click or tap here to enter text.

Date: Click or tap here to enter text.

**1. CHILD OF APPLICATION**

- a) Full Names Click or tap here to enter text.  
*(Please underline surname)*
- b) Date of birth Click or tap here to enter text.
- c) Term / year Click or tap here to enter text.  
for entry or  
date of joining

**2. APPLICANTS (see note 2)**

	<b>Parent/Carer 1</b>	<b>Parent/Carer 2</b>
a) Names and title	Click or tap here to enter text.	Click or tap here to enter text.
Date of birth	Click or tap here to enter text.	Click or tap here to enter text.
b) <u>HOME</u> Address	Click or tap here to enter text.	Click or tap here to enter text.
	Click or tap here to enter text.	Click or tap here to enter text.
	Click or tap here to enter text.	Click or tap here to enter text.
	Click or tap here to enter text.	Click or tap here to enter text.
	Click or tap here to enter text.	Click or tap here to enter text.
	Click or tap here to enter text.	Click or tap here to enter text.
c) Home Tel	Click or tap here to enter text.	Click or tap here to enter text.
d) Mobile Tel	Click or tap here to enter text.	Click or tap here to enter text.

- e) E-mail                      Click or tap here to enter text.                      Click or tap here to enter text.
- f) Employer name                      Click or tap here to enter text.                      Click or tap here to enter text.
- g) Occupation                      Click or tap here to enter text.                      Click or tap here to enter text.
- h) Are you a Co. Director?                      Click or tap here to enter text.                      Click or tap here to enter text.
- i) Shareholding of co./business                      Click or tap here to enter text.                      Click or tap here to enter text.

### 3. FINANCIAL DATA (see note 3)

<b>INCOME</b>	<b>PER MONTH</b>	<b>PER YEAR</b>
PAYE Parent/Carer 1	Click or tap here to enter text.	Click or tap here to enter text.
PAYE Parent/Carer 2	Click or tap here to enter text.	Click or tap here to enter text.
SELF-EMPLOYED INCOME 1	Click or tap here to enter text.	Click or tap here to enter text.
SELF-EMPLOYED INCOME 2	Click or tap here to enter text.	Click or tap here to enter text.
BUSINESS DIVIDENDS 1	Click or tap here to enter text.	Click or tap here to enter text.
BUSINESS DIVIDENDS 2	Click or tap here to enter text.	Click or tap here to enter text.
PENSIONS RECEIVED (Both)	Click or tap here to enter text.	Click or tap here to enter text.
INVESTMENT INCOME (Both)	Click or tap here to enter text.	Click or tap here to enter text.
<b>BENEFITS:</b>		
Child Benefit	Click or tap here to enter text.	Click or tap here to enter text.
Tax Credits	Click or tap here to enter text.	Click or tap here to enter text.
Universal Credits	Click or tap here to enter text.	Click or tap here to enter text.
Carer's Allowance	Click or tap here to enter text.	Click or tap here to enter text.
Disability / PIP	Click or tap here to enter text.	Click or tap here to enter text.
Housing / Council Tax	Click or tap here to enter text.	Click or tap here to enter text.
Other Benefits	Click or tap here to enter text.	Click or tap here to enter text.
MAINTENANCE RECEIVED (Child and spousal)	Click or tap here to enter text.	Click or tap here to enter text.
FAMILY SUPPORT	Click or tap here to enter text.	Click or tap here to enter text.
STUDENT FINANCE	Click or tap here to enter text.	Click or tap here to enter text.
BENEFITS IN KIND	Click or tap here to enter text.	Click or tap here to enter text.
OTHER INCOME	Click or tap here to enter text.	Click or tap here to enter text.

<b>RENTAL PROPERTIES (IF ANY, NOT THE FAMILY HOME)</b>	<b>PER MONTH</b>	
<b>INCOME</b>		



<b>RENTAL INCOME</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>EXPENDITURE</b>		
<b>MORTGAGE</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>AGENT'S FEES</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>OTHER EXPENSES:</b>		
<b>Landlord's Insurance</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Maintenance Contracts</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Ground Rent</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Service Charges</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Certification</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Council Tax</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Utility Bills</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Repairs/maintenance</b>	Click or tap here to enter text.	Click or tap here to enter text.
<b>Other Expenses</b>	Click or tap here to enter text.	Click or tap here to enter text.

<b>EXPENDITURE</b>	<b>PER MONTH</b>	<b>PER YEAR</b>
PAYE TAX paid Parent/Carer 1	Click or tap here to enter text.	Click or tap here to enter text.
PAYE TAX paid Parent/Carer 2	Click or tap here to enter text.	Click or tap here to enter text.
DIVIDEND TAXES (Both)	Click or tap here to enter text.	Click or tap here to enter text.
NI paid Parent/Carer 1	Click or tap here to enter text.	Click or tap here to enter text.
NI paid Parent/Carer 2	Click or tap here to enter text.	Click or tap here to enter text.
PENSION CONTRIBS 1	Click or tap here to enter text.	Click or tap here to enter text.
PENSION CONTRIBS 2	Click or tap here to enter text.	Click or tap here to enter text.
LIFE INSURANCES	Click or tap here to enter text.	Click or tap here to enter text.
PRIVATE HEALTH	Click or tap here to enter text.	Click or tap here to enter text.
MORTGAGE	Click or tap here to enter text.	Click or tap here to enter text.
RENT	Click or tap here to enter text.	Click or tap here to enter text.
GRD RENT/SERV CHARGE	Click or tap here to enter text.	Click or tap here to enter text.
HOUSE INSURANCE	Click or tap here to enter text.	Click or tap here to enter text.
COUNCIL TAX	Click or tap here to enter text.	Click or tap here to enter text.
LIGHT/HEAT/POWER	Click or tap here to enter text.	Click or tap here to enter text.
WATER	Click or tap here to enter text.	Click or tap here to enter text.
OTHER HOUSEHOLD INS	Click or tap here to enter text.	Click or tap here to enter text.
FOOD <u>INCL</u> SCHOOL LUNCHES	Click or tap here to enter text.	Click or tap here to enter text.
CLOTHING	Click or tap here to enter text.	Click or tap here to enter text.
LANDLINE/BROADBAND PACKAGES	Click or tap here to enter text.	Click or tap here to enter text.
MOBILES	Click or tap here to enter text.	Click or tap here to enter text.
TV LICENCE	Click or tap here to enter text.	Click or tap here to enter text.
SKY/NETFLIX/PRIME Etc	Click or tap here to enter text.	Click or tap here to enter text.
MEDICAL EXPS	Click or tap here to enter text.	Click or tap here to enter text.
PET EXPS	Click or tap here to enter text.	Click or tap here to enter text.
PUBLIC TRANSPORT EXPS	Click or tap here to enter text.	Click or tap here to enter text.
CAR 1 FINANCE	Click or tap here to enter text.	Click or tap here to enter text.
CAR 1 FUEL	Click or tap here to enter text.	Click or tap here to enter text.
CAR 1 TAX/INS/MAINT	Click or tap here to enter text.	Click or tap here to enter text.
CAR 2 FINANCE	Click or tap here to enter text.	Click or tap here to enter text.
CAR 2 FUEL	Click or tap here to enter text.	Click or tap here to enter text.
CAR 2 TAX/INS/MAINT	Click or tap here to enter text.	Click or tap here to enter text.
BREAKDOWN/PARKING	Click or tap here to enter text.	Click or tap here to enter text.
UNIVERSITY SUPPORT	Click or tap here to enter text.	Click or tap here to enter text.
NURSERY FEES	Click or tap here to enter text.	Click or tap here to enter text.
TUTORS (Academic/Music)	Click or tap here to enter text.	Click or tap here to enter text.
CHILDCARE	Click or tap here to enter text.	Click or tap here to enter text.
CHILD/SPOUSAL MAINTENANCE PAID	Click or tap here to enter text.	Click or tap here to enter text.
PROFESSIONAL FEES	Click or tap here to enter text.	Click or tap here to enter text.
CHARITABLE DONATIONS	Click or tap here to enter text.	Click or tap here to enter text.

<b>DEBT SERVICING</b>	<b>PER MONTH</b>	<b>PER YEAR</b>
LOAN REPAYMENTS	Click or tap here to enter text.	Click or tap here to enter text.
CREDIT CARD REPAYMENTS	Click or tap here to enter text.	Click or tap here to enter text.
DEBT MANAGEMENT REPAYMENTS	Click or tap here to enter text.	Click or tap here to enter text.

<b>ACTIVITIES</b>		
CHILDREN'S ACTIVITIES	Click or tap here to enter text.	Click or tap here to enter text.
PARENTS' ACTIVITIES	Click or tap here to enter text.	Click or tap here to enter text.
HOLIDAYS	Click or tap here to enter text.	Click or tap here to enter text.

**OTHER EXPENSES (eg Tithes):**

Click or tap here to enter text.

**PLANNED CAPITAL EXPENDITURE IN THE NEXT 12 MONTHS (eg house, vehicle, white goods):**

Click or tap here to enter text.

**VEHICLE DETAILS:**

<b>Make &amp; MODEL</b>	<b>REG NUMBER</b>	<b>VALUE</b>
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

**STATEMENT OF AIM**

Please indicate how much you feel you can contribute towards school fees each term: Click or tap here to enter text.

<b>ASSETS</b>	<b>PARENT/CARER 1</b>	<b>PARENT/CARER 2</b>
FAMILY HOME	Click or tap here to enter text.	Click or tap here to enter text.
OTHER UK PROPERTY	Click or tap here to enter text.	Click or tap here to enter text.
FOREIGN PROPERTY	Click or tap here to enter text.	Click or tap here to enter text.
CURRENT ACCOUNT	Click or tap here to enter text.	Click or tap here to enter text.
DEPOSIT ACCOUNT	Click or tap here to enter text.	Click or tap here to enter text.
SHARES/EQUITIES	Click or tap here to enter text.	Click or tap here to enter text.
ISAs	Click or tap here to enter text.	Click or tap here to enter text.
PREMIUM BONDS	Click or tap here to enter text.	Click or tap here to enter text.
FIXED TERM BONDS	Click or tap here to enter text.	Click or tap here to enter text.
OTHER INVESTMENTS	Click or tap here to enter text.	Click or tap here to enter text.
PENSION (IF OVER 55)	Click or tap here to enter text.	Click or tap here to enter text.
SETTLEMENTS DUE	Click or tap here to enter text.	Click or tap here to enter text.
DECLARED INSURANCE ITEMS	Click or tap here to enter text.	Click or tap here to enter text.
VEHICLE VALUE	Click or tap here to enter text.	Click or tap here to enter text.
VALUE OF BUSINESS	Click or tap here to enter text.	Click or tap here to enter text.

<b>LIABILITIES (MONIES OWED)</b>	<b>PARENT/CARER 1</b>	<b>PARENT/CARER 2</b>
MORTGAGE (FAMILY HOME)	Click or tap here to enter text.	Click or tap here to enter text.
SECURED LOANS	Click or tap here to enter text.	Click or tap here to enter text.
OTHER UK MORTGAGES	Click or tap here to enter text.	Click or tap here to enter text.
FOREIGN MORTGAGES	Click or tap here to enter text.	Click or tap here to enter text.
COMMERCIAL LOANS	Click or tap here to enter text.	Click or tap here to enter text.
FAMILY LOANS	Click or tap here to enter text.	Click or tap here to enter text.
FINANCE LEASES	Click or tap here to enter text.	Click or tap here to enter text.
CREDIT CARDS	Click or tap here to enter text.	Click or tap here to enter text.
ARREARS	Click or tap here to enter text.	Click or tap here to enter text.
SCHOOL FEE ARREARS	Click or tap here to enter text.	Click or tap here to enter text.
DEBT MANAGEMENT	Click or tap here to enter text.	Click or tap here to enter text.

**If properties, other than the family home, are owned please list full addresses below:**

Click or tap here to enter text.

**4. DEPENDENT CHILDREN**

(see note 4)

	<b>Applicant</b>	<b>Child 2</b>	<b>Child 3</b>	<b>Child 4</b>
a) Child's name	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
b) Date of birth	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
c) Current school	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
d) State or independent	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
e) Boarding or day				
f) Annual fees	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
g) Compulsory extras	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
h) Fees covered by:	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
i) School scholarships/ bursaries/ allowances				
ii) Family assistance	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
iii) Other assistance	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.
iv) Child's income	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.	Click or tap here to enter text.

**IS YOUR CHILD IN RECEIPT OF FREE SCHOOL MEALS?**

Click or tap here to enter text.

**5. OTHER DEPENDENTS (see note 5):**

Click or tap here to enter text.

**6. Please use this section to add any information which you feel is relevant to your application (see note 6)**

Click or tap here to enter text.

**DOCUMENTS TO BE SUPPLIED**

Please supply **COPIES** of the following documents:

Last 3 payslips for each applicant

Last P60 for each applicant  
Latest **FULL** audited accounts (if appropriate)  
Latest self-assessment tax calculation **summary (SA302)** (if appropriate) for each applicant (please do not send full tax return)  
Schedule D self-employment income declaration (if appropriate) for each applicant  
3 months' bank statements for **all accounts**  
Proof of value of savings and investments (may include internet valuation)  
Latest pension valuation if over 55  
Benefit/Tax Credit/Universal Credit letters (if appropriate)

Latest mortgage statement (on all properties if appropriate) / rent agreement  
Latest loan statements  
Latest credit card statements  
Contents insurance schedule

Legal financial agreements

**IF THIS IS A RENEWAL APPLICATION PLEASE INCLUDE A COPY OF YOUR LAST TERM'S INVOICE FOR EACH CHILD OF THE FAMILY, EVEN IF THE OTHER CHILDREN ARE NOT AT THE SCHOOL OF THIS APPLICATION**

Any other appropriate documents to support your application

**ANY ORIGINAL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED. COPY DOCUMENTS WILL BE SHREDDED SECURELY.**

**YOU WILL BE NOTIFIED THE FINAL RESULT BY THE SCHOOL DIRECTLY**

## **DECLARATION**

After having read the attached notes, the following declaration should be signed by all applicant(s) (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 we/I are/am applying 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 grant
- 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 forms on the forms sent to us/me by the school or its agent and supply all relevant supporting evidence by the return date indicated
- c) We/I undertake to report immediately any material change in the financial position declared
- d) The grant 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 to the acceptance of a place for our/my child at the school
  - ii) we/I have knowingly and/or recklessly provided false 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 or its agent to evidence our/my financial circumstances
  - v) there is in the view of the Head either unsatisfactory work or conduct
  - vi) the school's resources are insufficient to maintain the level of the award

**Signatures:**

Parent/Carer 1      Click or tap here to enter text. **Date** Click or tap here to enter text.

Parent/Carer 2      Click or tap here to enter text. **Date** Click or tap here to enter text.

If the above declaration is signed by only one parent, please give reason by deleting as necessary below:

Divorced / separated / widowed  
Other (state reason)

Please return this form and all documents to:  
BURSARY ADMINISTRATION LIMITED at [admin@schoolbursaryguide.com](mailto:admin@schoolbursaryguide.com). You are welcome to use Dropbox or any other document exchange system.  
Telephone 01622 725712 or email [admin@schoolbursaryguide.com](mailto:admin@schoolbursaryguide.com) for all queries

**GUIDANCE NOTES**

**Please read these carefully before completing the Application Form. If you need further help, please contact Bursary Administration.**

**The numbers below refer to the same numbers on the application form.** If you pay tax in any way, please include the appropriate reference number. If any of your assets are held abroad please convert the value to pounds sterling.

## 2. APPLICANTS

Anyone with care and control of a child can apply for assistance. This person could be:

- the natural father and mother of a child where they live together
- the natural father or mother of a child and their new partner
- the child's appointed Guardian (appointed by a Court)
- the person with whom a child resides and has care and control of the child as a result of a court order or other legal agreement
- the person with whom a child resides and has care and control of the child as a result of an informal agreement

Please note Foster Parents acting under a Full Care Order will be regarded as having no income

Please note if the natural parents are separated and/or divorced both will be required to provide financial information and sign an Application Form, either together or separately

## 3. FINANCIAL DATA

- Gross salaries for both parents/carers
- Dividends received from an owned limited company
- Net self-employed income before tax
- Pensions received
- Gross investment income
- Benefits received
- Maintenance payments received (formal or informal)
- Support from family or friends
- Any other income
- Rental properties – income and expenses
- Maintenance payments being made
- Family expenditure detailed in the form
- Combine assets and liabilities according to type

**Please either show assets by Parent/Carer 1 // Parent/Carer 2 or combined as appropriate.**

## 4. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 – 4 for any other dependents.

e) Please refer to the current academic year

h) (iii) Please state any other educational allowances received. If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year.

(iv) If the child is in receipt of financial assistance from a Trust Deed or other external source please declare the annual amount available, and please enter the gross amount of any interest / share dividends received by the child



**5. OTHER DEPENDENTS**

Please provide details of any other family members who are financially dependent upon you.

**6. ANY OTHER RELEVANT INFORMATION**

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

***YOU MAY WISH TO KEEP A COPY OF YOUR COMPLETED  
APPLICATION FORM FOR YOUR OWN RECORDS***

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