

**BURSARY ADMINISTRATION LIMITED**

on behalf of

**IAPS Charitable Trust Bursary Scheme**

**(Senior Schools only)**

**BURSARY APPLICATION FORM**

(New applicants)

**Confidential Statement of Financial Circumstances**

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

**Please use this page to add any information which you feel is relevant to your application** (see note 9)

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| --- | --- | --- |
| 1. | **CHILD** |  |
|  | a) Full Names | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | b) Date of birth | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | c) Term / year for entry or date of joining | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| 2.  | **PARENTS** | (see note 2) |  |
|  |  | **Parent/Step parent 1**  | **Parent/Step parent 2**  |
|  | a) Names and title | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | b) Address | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  |  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | c) Occupation | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | d) Employment Status | Retired – Self-employed – Employed – Unemployed(please circle) | Retired – Self-employed – Employed – Unemployed(please circle) |
|  | e) Employer name | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | f) Shareholding of business |  |  |
|  | g) Are you a Co.  Director? |  |  |
|  | h) Daytime Tel | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | i) Evening Tel | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | j) Mobile | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
|  | k) E-mail | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
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| 3. | **INCOME** | (see note 3) |  |  |
|  | **Please use annual amounts** | **Parent/Step parent 1 £** | **Parent/Step parent 2 £** | **Combined £** |
|  | a) Gross salary |  |  |  |
|  | b) Business profits or  self-employed earnings |  |  |  |
|  | c) Gross pensions |  |  |  |
|  | d) Gross investment income |  |  |  |
|  | e) Gross rents received |  |  |  |
|  | f) Benefits received |  |  |  |
|  | g) Maintenance received |  |  |  |
|  | h) Court order /  separation agreement  – school fees receivable |  |  |  |
|  | i) Benefits in kind  received free |  |  |  |
|  | j) Family support |  |  |  |
|  | k) Any other income |  |  |  |
|  | **TOTAL** |  |  |  |

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| 4. | **OUTGOINGS** | (see note 4) |  |  |
|  | **Please use annual amounts** | **Parent/Step parent 1 £** | **Parent/Step parent 2 £** | **Combined £** |
|  | a) Tax on incomes above |  |  |  |
|  | b) NI contributions |  |  |  |
|  | c) Pension contributions |  |  |  |
|  | d) Mortgage payments on  main residence |  |  |  |
|  | e) Rental property expenses |  |  |  |
|  | f) Household insurances |  |  |  |
|  | g) Rent - main residence |  |  |  |
|  | h) Council Tax and utilities |  |  |  |
|  | i) Loan repayments |  |  |  |
|  | j) Credit card repayments |  |  |  |
|  | k) Food and subsistence |  |  |  |
|  | l) Clothing |  |  |  |
|  | m) Vehicle costs |  |  |  |
|  | n) Leisure |  |  |  |
|  | o) Holidays |  |  |  |
|  | **TOTAL** |  |  |  |
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| 5. | **CAPITAL ASSETS** | (see note 5) |  |  |
|  | **Approximate market value** | **Parent/Step parent 1 £** | **Parent/Step parent 2 £** | **Combined £** |
|  | a) i) Bank / building  society balances |  |  |  |
|  |  ii) Equity / bond values |  |  |  |
|  |  iii) PEPs/ISAs/TESSAs |  |  |  |
|  | b) Pension schemes |  |  |  |
|  | c) Value of main residence |  |  |  |
|  | d) Value of other properties |  |  |  |
|  | e) Value of vehicles |  |  |  |
|  | f) Net worth of business |  |  |  |
|  | g) Redundancy settlements  due |  |  |  |
|  | h) Insurance settlements  due |  |  |  |
|  | **TOTAL** |  |  |  |

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| 6.  | **CAPITAL LIABILITIES** | (see note 6) |  |  |
|  |  | **Parent/Step parent 1 £** | **Parent/Step parent 2 £** | **Combined £** |
|  | a) Mortgage amount  outstanding |  |  |  |
|  | b) Mortgage outstanding  on other properties |  |  |  |
|  | c) i) loans |  |  |  |
|  |  ii) credit cards |  |  |  |
|  |  iii) finance leases |  |  |  |
|  | **TOTAL** |  |  |  |

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|  | **SUMMARY** | **Parent/Step parent 1 £** | **Parent/Step parent 2 £** | **Combined £** |
|  | Income |  |  |  |
|  | Deduct Outgoings |  |  |  |
|  | **TOTAL** |  |  |  |
|  | Capital Assets |  |  |  |
|  | Deduct Capital Liabilities |  |  |  |
|  | **TOTAL** |  |  |  |

Please indicate on a separate page if necessary why net assets cannot be converted or used to pay school fees

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| 7. | **DEPENDENT CHILDREN** | (see note 7) |  |  |  | **NOTES** |
|  |  | **Applicant** | **Child 2** | **Child 3** | **Child 4** |  |
|  | a) Forename |  |  |  |  |  |
|  | b) DOB |  |  |  |  |  |
|  | c) Current school |  |  |  |  |  |
|  | d) Boarding or day |  |  |  |  |  |
|  | e) Annual fees |  |  |  |  |  |
|  | f) Compulsory  extras |  |  |  |  |  |
|  | g) Uniforms |  |  |  |  |  |
|  | **SUB TOTAL****(a-g)** |  |  |  |  |  |
|  | h) Fees covered by: i) School scholarships / bursaries / allowances |  |  |  |  |  |
|  |  ii) Family assistance |  |  |  |  |  |
|  |  iii) Other assistance |  |  |  |  |  |
|  |  iv) Child’s  income |  |  |  |  |  |
|  | **SUB TOTAL****(hi-iv)** |  |  |  |  |  |
|  | **TOTAL (a-g)****LESS (h)** |  |  |  |  |  |

8. **OTHER DEPENDENTS** (see note 8)

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**STATEMENT OF AIM**

Please indicate how much you feel you can contribute towards school fees each term:

**DOCUMENTS TO BE SUPPLIED**

Please supply originals of the following documents:

Last 3 payslips

Last P60

Latest audited accounts (if appropriate)

Latest management accounts (if audited accounts are more than 9 months old)

Latest self-assessment tax calculation (if appropriate)

Schedule D self-employment income declaration (if appropriate)

3 months’ bank statements

Proof of value of investments (may include internet valuation)

Latest pension and endowment valuation

Benefit letters (if appropriate)

Latest mortgage statement (on all properties if appropriate) / rent agreement

Latest loan statements

Contents insurance schedule

Legal financial agreements

Any other appropriate documents to support your application

**ALL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED**

**YOU WILL BE NOTIFIED THE FINAL RESULT BY IAPS CHARITABLE TRUST DIRECTLY**

**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 we/I are/am applying for our/my child and accept a place for him/her at the school:

1. Our/my child’s fees account with the school will be credited termly with the amount of the grant
2. 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
3. We/I undertake to report immediately any material change in the financial position declared
4. The grant may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
	1. there is a breach of the school’s Terms and Conditions to the acceptance of a place for our/my child at the school
	2. we/I have knowingly and/or recklessly provided false information
	3. we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated
	4. we/I have failed to produce any additional information required by the school or its agent to evidence our/my financial circumstances
	5. there is in the view of the Head either unsatisfactory work or conduct
	6. the school’s resources are insufficient to maintain the level of the award

**Signatures:**

Parent/Step parent 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Parent/Step parent 2\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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:

The Grants Secretary, IAPS Charitable Trust, c/o IAPS, 11 Waterloo Place, Leamington Spa, CV32 5LA

Telephone 07710 524911 or email daphne@thecawthornes.plus.com for all queries

**GUIDANCE NOTES**

**Please read these carefully before completing the Application Form. If you need further help, please contact The Grants Secretary.**

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. **PARENTS / 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 the Application Form

3. **INCOME**

a) The gross annual amount of income **FROM ANY SOURCE** for the current or latest financial year

b) Profits from a business or profession – the gross amount agreed for taxation purposes. Deductions should only be made in respect of capital allowances, losses and stock relief. Please include the latest set of accounts.

d) All investment income, including building society interest, should be shown gross

e) Gross income from letting or sub-letting of property

f) Please list on a separate sheet if necessary all social security benefits, naming their type and how long each have been received for

g) All income from maintenance payments, separation allowances and Child Support maintenance must be declared. Arrears in any payments will not be taken in to account.

h) Where a parent is required by any Court or legal order to pay part of the school fees then only the part of the fee which is not covered by the order will be used to calculate any grant awarded. Arrears in any payments of part schools fees will not be taken in to account.

i) Include free benefits in kind that are agreed by the Inland Revenue as not being subject to tax

j) Royalties and all other sources including entertainment and travel allowances

4. **OUTGOINGS**

a) Enter income tax and tax on unearned income **TOGETHER**

c) Enter payments to pension schemes

d) Enter capital as well as interest payment on a mortgage for the main residence

e) Only complete this if repayment is effected by a full Endowment Policy

j) Bank overdraft and other loan charges (please state the purpose of the loan)

5. **PARENTS’ / APPLICANTS’ CAPITAL ASSETS**

The following will be taken in to account:

a) Monies held on deposit at any bank or building society. The value of investments in stocks and shares at the time of application.

c) The current market value of the main residence (please estimate)

d) The current market value of any other properties (please estimate)

f) If you run your own business or are partners in a business, then you should show the total net worth of the business. Shares in a company not listed on the Stock Exchange should be valued at your share of the net value of the company.

6. **PARENTS’ / APPLICANTS CAPITAL LIABILITIES**

Please detail all other monies owed, together with the lender’s name on a separate sheet if necessary

7. **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

 (iv) If you have been able to claim under any policy, please declare the amount

 received under the policy for the current academic year

 (v) If the child is in receipt of financial assistance from any other family

 members or income from a Trust Deed please declare the annual amount

 available

i) Please enter the gross amount of any interest / share dividends received by the child

8. **OTHER DEPENDENTS**

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

9. **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***