

BURSARY APPLICATION

Important notes

- 1 *The person submitting this form is the **applicant**. The child for whom support is sought is the **candidate**.*
- 2 *The applicant must have read and understood the Terms and Conditions before filling in this form.*
- 3 *We suggest that you complete this form by downloading it from our website and typing your answers, then printing it.*
- 4 *If this is not possible, please complete the form in black ink and your very clearest handwriting.*
- 5 *Any additional information should be on a separate sheet, clearly referenced back to the relevant section of the form.*
- 6 *Post the form to the address above in an envelope **marked "Bursaries – confidential"**. Please do so as soon as you can.*
- 7 *We ask you to note that where the parents of the candidate are in a stable relationship with each other, your application is on behalf of both parents acting jointly. All information must be completed in respect of both parents; both must sign the declaration on the final page. It should then be posted to the address above.*
- 8 *Where the parents are not in a stable relationship, we will normally need a **supplementary application** from the parent who is not the applicant.*
- 9 *Where you are applying as a guardian, we will normally expect you to apply jointly with another guardian (if there is more than one guardian). We will normally need separate applications from any further adults with a close relationship to the candidate, such as surviving parents and any further joint guardians.*
- 10 *In the cases described in 6 and 7 above, please help us to give you a speedy response by submitting all supplementary applications with your application. If this is not practicable, please supply names and contact details for all such persons, in a separate sheet.*

SECTION A – about the candidate and the applicant

1. Details of the candidate

<u>Surname</u>	<u>First Names</u> (please underline name generally used)
<u>Address</u>	
<u>Date of Birth</u> (dd / mm / yy)	<u>Boy or Girl</u>
<u>Present School, and Address</u> (only where the candidate is not already at a Thomas's school)	

Relationship to candidate

4. Applicants' Dependent Children

Please list all children whom you support financially

<u>Age</u>	<u>Status - at school (specify type: day/ boarding, private/state), tertiary education, other?</u>

5. Short description of any other dependents

SECTION B – about your financial position

Notes:

All columns must be completed. Please enter cash amounts to the nearest £1000. Enter 'Nil' where the amount is less than £1000.

If you do not have firm amounts please add 'E' to each such amount, to show that it is an estimate.

Income and outgoings should be for the most recent tax year.

If the figures you enter are significantly different from the two previous years, please outline the reason on a separate sheet.

If you expect them to be significantly different in future, please tell us why, on a separate sheet.

If you have any income or assets outside the UK you must include them.

We appreciate that some of the answers may be 'nil', and that you will have to do a fair amount of work to supply the information to us. Please understand our need to have a full and accurate disclosure.



6. Your annual income

If your circumstances have changed a lot recently, please give estimates of expected figures for the coming year. Otherwise, you can give figures for the last 12 months, last calendar year or last tax year – whichever is more convenient.

	Income at annual rate	First applicant	Second applicant	Candidate
(a)	Annual salary/wages: include any bonuses, other income, earnings from second jobs			
(b)	Redundancy payments			
(c)	Profit from business or profession (latest tax year, and average over last 3 tax years)			
(d)	Pension or retirement pay			
(e)	Investment income (net of tax) from all classes of financial assets			
(f)	Income from trusts, financial settlements etc.			
(g)	Income from property (UK and abroad) in last tax year			
(h)	Any maintenance payments			
(i)	Social security receipts, including child benefits			



(j)	Other income or allowances			
(k)	Benefits in kind provided in last tax year by employer (e.g. house, car, etc.) with detail			
(l)	Total			

7. Other receipts of cash or assets - Please supply the total for the last 3 years

Category		First applicant	Second applicant	Candidate
(a)	Inheritances - as well as any cash, include the approximate market value of other assets received			
(b)	Have you disposed of any significant assets (e.g. houses, shareholdings) in the last 3 years? – if so, enter the sale proceeds .			
(c)	Receipts of cash from life assurance, maturing endowment plans, investment bonds and the like (the total of all amounts received in the last 3 calendar years)			
(d)	Redundancy or other ex-gratia payments			
(e)	Any one-off cash or assets received from family or trusts			

8. Your assets now



At estimated market value		First applicant	Second applicant	Candidate
(a)	Estimated value of main residence (to the nearest £50,000)			
(b)	Any other houses, land or buildings (to the nearest £50,000)			
(c)	Are you a beneficiary of any trust?			
(d)	Financial assets (other than pension) – supply the total value, including deposits, shares, unit trusts, endowment insurance, investment bonds, national savings, premium bonds, etc.			
(e)	Details of any stock options, and any other participation in the value of a business			
(f)	Other valuables such as art, jewellery, fine wine – please supply total insurance value if in excess of £5000			
(g)	Insurance value of household contents (excluding any items covered in (f) above)			
(h)	Pension assets 1. defined benefit pensions – current estimate of the annual value of each future pension (other than state pensions) and the date at which each is expected to become payable			



	2. market value of investments in defined contribution pension pot(s)			
	3. market value of SIPPs			
	4. market value of any other pension assets such as AVCs			

9. Your Annual Outgoings - *For most recent year*

		First applicant	Second applicant	Candidate
(a)	Income taxes and NIC (from your P60 or other tax statement)			
(b)	Rent			
(c)	Mortgage repayments (of which, capital repayments)			
(d)	School fees (including extras) paid after subtracting any assistance or scholarships (footnote 1)			



(e)	Pension contributions			
(f)	Non-mortgage loan repayments 1. total 2. on debt other than credit card repayments – e.g. HP 3. typical total payments on all credit cards, each month			
(g)	Life insurance premiums			
(h)	Any other material regular outgoings other than utility bills, clothing, travel, living expenses (please specify)			

Footnote 1: Please give details of any fee provision: a school fees saving scheme, capital pre-payment or educational policy; assistance from an LEA, any employer, or through student loans or help from relatives etc.



10. Your Debts Now

		First applicant	Second applicant	Candidate
	Total amount			
(a)	Debt secured against property (e.g. mortgages)			
(b)	Other debt – do not complete unless the total is in excess of £2000. Include credit cards.			

SECTION C – about your wider circumstances, and plans

11. The Trustees expect applicants to have made substantial endeavours to obtain support from family members (including godparents, grandparents, legal guardians, step-parents, partners and independent siblings of the candidate) where such family members have enough income or assets to enable them to help with fees. Which family members have you approached? What contributions have been offered?

12. Any other relevant information (e.g. foreseeable change in income, expectation of capital as the beneficiary under a will, trusts made for future education and the like).

13. Finally, please attach a letter explaining

- **why you have approached us for assistance ;**
- **what has caused any recent change in your financial circumstances;**
and
- **your plans for the candidate's continuing education (including how it will be financed in the years ahead).**

SECTION D - Declaration and signatures

I/We certify that I/we have read and understand the Terms and Conditions.

I/We certify that all the information provided in this application is accurate and complete.

I/We certify that this application is a complete and accurate statement of the financial circumstances of the family.

I/we undertake to give written notification of any material changes, if and when they occur, to the Chairman of Trustees of Thomas's Schools Foundation.

I/We enclose a photocopy (or original) of all tax documents in the most recent 3 tax years, to include: **our tax returns** (where available), **our P60s**, and **full accounts for any business** in which I/we have a financial interest (other than via listed shares).

In signing this application, I/we give explicit consent to the disclosure and use of the information I/we have supplied to the members of the bursaries committee, to Foundation trustees and to the Principals of the Thomas's Schools for the purposes of assessing my/our eligibility for a bursary. I/We understand that the information will not be disclosed to other parties without my/our written consent in each case or where required by applicable law.

Signatures:

First applicant

date

Second applicant

date

Please tell us how you heard of the Foundation Bursary scheme:

head teacher _____, website _____, poster _____, friend _____, other _____.