

BIRKDALE SCHOOL**BURSARY APPLICATION FORM**

[This questionnaire is based upon the form recommended by the Independent Schools' Bursars Association]

Please read the Guidance Notes (on pages 8 & 9) *before* completing the form

1. CHILD		
a)	Full Name	
b)	Date of Birth	
c)	Term/Year of Entry	
2. PARENTS		
	Father	Mother
a)	Full Name	
b)	Title	
c)	Address	
d)	Daytime Tel	
e)	Evening Tel	
f)	Mobile	
g)	E-Mail Address	
3. PARENTS' OCCUPATIONS		
	Father	Mother
a)	Employed (insert occupation and employer's name & address)	

	Are you a Director or Shareholder or Proprietor of this Company?	Yes / No	Yes / No
	If "YES" state proportion of business you own		
b)	Self-employed / partner in partnership (state type of business)		
	If a partner, state your share of partnership income and capital, if any		
c)	Unemployed		
d)	Retired		
4. INCOME (Please enter below your earnings and expected income from all sources for the current or latest tax year)			
		Father	Mother
a)	Gross Salary and other emoluments (including all taxable benefits & expenses)		
b)	Taxable profits of trade or profession for latest tax year		
c)	Pensions in payment		
d)	Gross investment income from: <ul style="list-style-type: none"> • Building Societies / Banks • Dividends and interest (other securities) 		
e)	Rental profit		
f)	Social Security benefits (including Child Tax Credits but excluding Child Benefit)		
g)	Separation or Maintenance Allowance		

h)	Is there a Court Order/Separation Agreement? If "YES", please state annual amount payable for school fees.	Yes/No	Yes/No
i)	Benefits in Kind provided free by reason of employment not already included in (a) above		
j)	Any other income or gains not included in (a) to (i) above, e.g. trust or estate income, gains on sale of capital assets, surrenders or maturity of life assurance policies, royalties etc.		
5. OUTGOINGS (annual)			
		Father	Mother
a)	Tax payable on Incomes declared above (<i>including tax deducted at source</i>)		
b)	National Insurance Contributions		
c)	Pension contributions		
d)	Mortgage repayments		
e)	Annual rent payable on principal residence		
6. CAPITAL ASSETS			
		Father	Mother
a)	Approximate market value of all investments:		
	• Building Society/Bank deposits/National Savings accounts		
	• Equity investments (shares, unit trusts), Corporate bonds and other securities and Government stocks		
	• ISAs		
	• Life assurance bonds and policies including endowments		
b)	Approximate market value of principal residence (<i>freehold or leasehold</i>)		
c)	Approximate market value of other possessions including house contents, car(s), collections, paintings, jewellery etc.		
d)	Cash at banks or elsewhere		

e)	Approximate market value of any other assets <i>(please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years)</i>		
f)	Net worth/value of any businesses which you own or share		
g)	Approximate market value of your interest in any other property, land or buildings either at home or abroad		
h)	Redundancy or other termination payments		
i)	Monies that are owed to you		
j)	Other assets not listed e.g. share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc.		

7. CAPITAL LIABILITIES

		Father	Mother
a)	Mortgage Details:		
	• amount outstanding on principal residence		
	• final payment date		
	• amount outstanding on other property		
	• final payment date		
b)	Other liabilities <i>(please specify)</i>		

8. NET ASSETS

TOTAL ASSETS (6) :

LIABILITIES (7) :

NET ASSETS (6-7) :

Please explain any reasons why Net Assets cannot be converted or utilised to pay school fees:

9. DEPENDENT CHILDREN (Include the child to whom this application refers: if more than 4 children, give details on a separate sheet)					
		1	2	3	4
a)	Forename				
b)	Date of Birth				
c)	School or College				
d)	Boarding or Day				
e)	Annual school or other educational fees (excluding extras and sundry disbursements)				
f)	Compulsory additional school charges				
g)	Amount of fees shown in (e) covered by:				
	<ul style="list-style-type: none"> Scholarships, Bursaries or other allowances given by school 				
	<ul style="list-style-type: none"> Services/Diplomatic/ Company Education Allowances (gross) (state whether sum has been included in gross salary at 3 (a)) 				
	<ul style="list-style-type: none"> Annual sum arising from Educational Insurance Policies 				
	<ul style="list-style-type: none"> Assistance from any other sources e.g. Grandparents, trusts, charities (please specify) 				
h)	Annual income of child (if any)				
10. OTHER DEPENDENTS (please give details)					

11. VERIFICATION OF INCOME Please enclose documentary evidence in support of the income figures in Section 4 and tick those you are enclosing	
Latest Payslip	Copy of HMRC tax calculation issued under Self-Assessment
PIID	Confirmation of Schedule D self-employment income from an independent accountant
Annual Accounts (including Balance Sheet)	
Others, e.g. copies of dividend vouchers, bank interest certificates (please specify)	
Court Orders and Legal Separation agreements (covering the payment of school fees and/or child maintenance)	
Benefits received (Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living Allowance, Incapacity Benefit)	
12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing	
Mortgage Statement	Investment Portfolio Valuation
Contents Insurance	Other (please specify)

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a Bursary from the School are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and, if so, to which and with what result.

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DECLARATION

After having read the attached notes, the following declaration should be signed by both parents (or see below):

We/I have read the notes and have made a complete and accurate declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for him/her at the School, the following terms and conditions will apply as between ourselves/myself and the School:

- a) our/my child's fees account with the School will be credited termly with the amount of the Bursary for so long as the award remains in effect
- b) any award of a Bursary is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the School and supply all relevant supporting evidence by the return date indicated
- c) we/I will report immediately any material change in the financial position declared
- d) the Bursary may be withdrawn or reduced if:
 - i. we/I act or our/my child acts in breach of the School's Terms and Conditions
 - ii. we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated
 - iii. we/I have failed to produce any additional information required by the School to evidence our/my financial circumstances
 - iv. in the opinion of the Head, our/my child's attendance, progress or behaviour no longer merits the continuation of the award
 - v. we/I are/am more than 31 days in arrears in respect of any amount due and owing to the School
 - vi. there is a material change in our/my financial circumstances
- e) the Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child's fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary

➤ **Signed:** Father Date.....

➤ **Signed:** Mother Date.....

If the Declaration is signed by only one parent, please state the reason below:

Divorced / separated / widowed / other – please specify:

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GUIDANCE NOTES FOR COMPLETION OF APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the form.

The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

SECTION 2: PARENTS

These are defined as:

- the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- the child's guardian appointed in accordance with section 5 of the Children Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
- the person with whom the child resides in accordance with either:
 - a. a subsisting residence order made under section 8 of the Children Act 1989; or
 - b. any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
- where a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; or
- where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.

SECTION 4: INCOME

- a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission, statutory sick pay, statutory maternity pay etc. giving **GROSS** amounts (before deduction of tax, NI, pension, etc.) for the current or latest financial year. Taxable benefits in kind agreed with HMRC (free or subsidised housing, meals, petrol, cars, etc.) should also be included at the amount agreed for taxable purposes.
- b) Profits from a business or profession should be entered at the **GROSS** amount declared to HMRC for the year in question. Copies of the latest set of accounts should be included. Where the profits assessed relate to a basis period in excess of or less than 12 months please state the length of that period.
- c) All Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities etc.) should be entered **GROSS** of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed **GROSS**.
- d) Income from letting or sub-letting of property should be entered at the amount of the profit declared to HMRC, net of related expenditure before tax.
- e) All Social Security benefits received, except Child Benefit, should be declared and the type(s) of benefit specified.
- f) Court Orders, Legal Separation Agreements and Voluntary Arrangements for school fees – where a parent is required by a Court Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the school fees, then only that part of the fee which is not covered by the

Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees is required to be paid by virtue of Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

SECTION 6: CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of the following assets:

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society; investments in stocks and shares, valued as near as possible to the date of submitting the form.
- b) The current market value of your principal residence. The current market value should be estimated by parents if a current/recent valuation is not available.
- c) If you run your own business or are a partner in a business, then you should show the net worth of the business. Shares in a company not listed on a Stock Exchange should be valued at the relevant proportion of the net value of the company.
- d) In the case of second homes and/or other properties, these should also be included at their estimated current market value.

SECTION 9: DEPENDENT CHILDREN

Use the first column for the child for whom you are now applying. Enter in the other columns any other children who are at a school, university or other educational institution.

- a) If any insurance policy for the payment of school fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.
- b) Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.
- c) Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax.

Page overleaf has been left blank for any additional information you need or wish to give

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