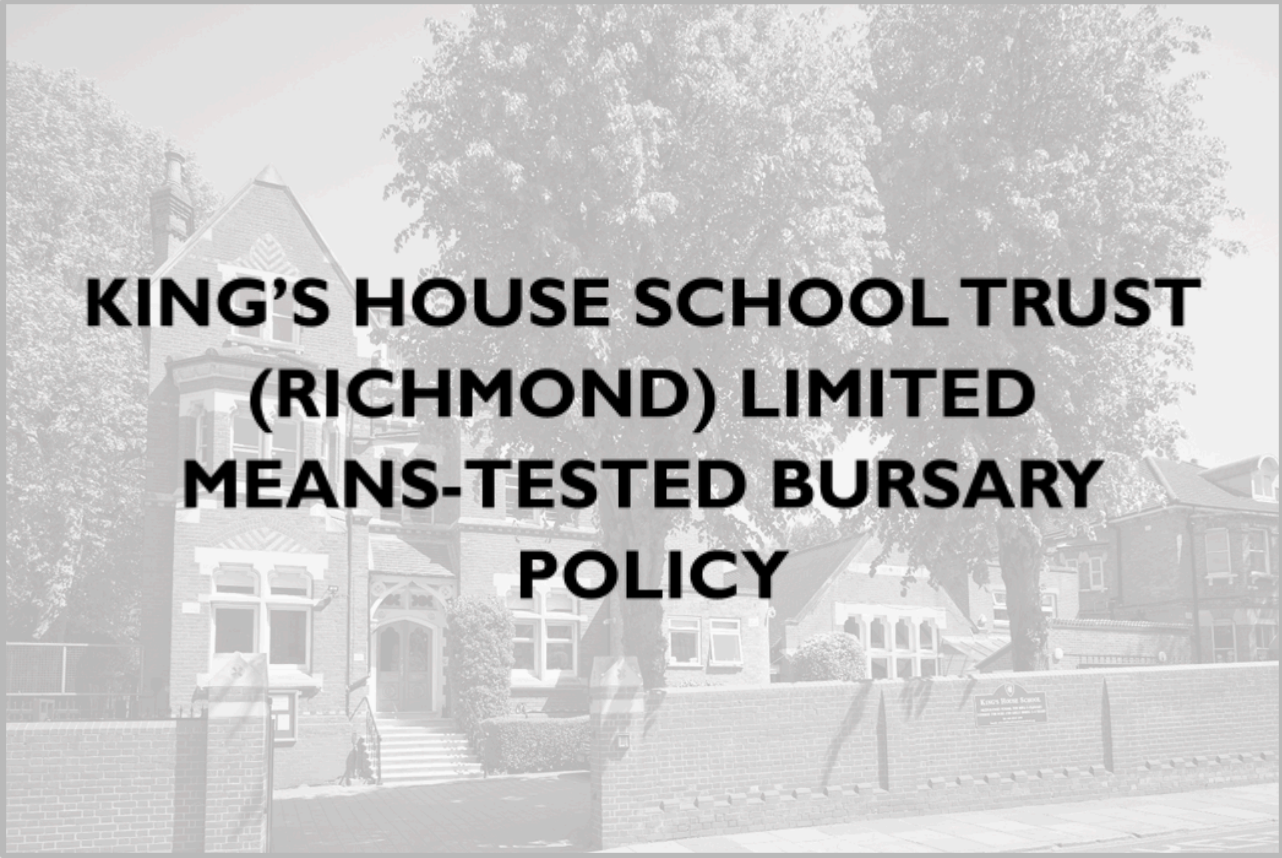




**KING'S HOUSE SCHOOL**  
RICHMOND



**KING'S HOUSE SCHOOL TRUST  
(RICHMOND) LIMITED  
MEANS-TESTED BURSARY  
POLICY**

Member of staff responsible: Bursar  
Date of policy review: March 2025  
Date of next review: March 2027  
Approved by Governors: March 2025



## **GENERAL**

The Governors of King's House School are committed to broadening access to the School by offering to eligible parents/guardians means-tested financial support with the payment of school fees. Such support is known as a Bursary, and Bursaries may be awarded in the form of a discount of up to 95 (ninety-five) per cent on tuition fees payable, depending on the financial, compassionate or other pertinent circumstances of applicants. The School employs the services of Bursary Administration Limited (BAL) to prepare the information which is used to assist in the decision making process.

Bursary awards are subject to repeat testing of parents'/guardians' means each year and may be varied upwards or downwards depending on individual parents'/guardians' circumstances (e.g. their savings, investments and realisable assets, as well as their income, the size of their family, any other persons dependent upon them and like factors), compassionate or other pertinent considerations. Requests for financial support usually fall into two categories:

- New applicants to the school where a place has been offered but parents/guardians are unable to fund the tuition fees.
- Existing pupils where a change in parents'/guardians' circumstances has resulted in difficulty in meeting tuition fees and may result in the child being withdrawn part way through a stage of education.

## **NEW APPLICANTS TO THE SCHOOL**

Information provided by the School alerting the parents/guardians of potential pupils to the possibility of obtaining means-tested financial support with the payment of school fees is included on the school website.

### The Application Process

Bursaries may be made available to parents/guardians of children entering any year group from Year 3 up to Year 6 of King's House School. Bursary applications are encouraged from pupils who may be seeking continuation of assistance from a senior school at 11+ or return to the state sector at that point. In exceptional circumstances, Bursary applications will be considered for Year 7 and 8, if that pupil has already secured assisted entry to an independent senior school at 13+.

Bursaries are awarded at the discretion of the Governors. The Head and Bursar are responsible for the management and coordination of the following process:



1. Parents/guardians seeking a Bursary are required to complete a BAL application form which seeks to establish the financial circumstances of the household. The form, which requests details of income and capital, may be found at Annex A and must be accompanied by full documentary evidence. The completed forms, together with the necessary documentary evidence, are to be submitted to the Bursar by no later than the **31<sup>st</sup> January** in any year, for Bursaries to start the following September.
2. All applications and supporting documents will be submitted to BAL so that they can be prepared in the format required by the School, in order to establish the likely level of support which will be required in order to allow the child to attend the School. A representative from BAL may arrange a visit to the parents'/guardians' home or arrange an online meeting to ensure the information has been correctly interpreted and the basis of the financial assessment has been fair.
3. The Bursar prepares a recommendation which is considered with the Head and a joint recommendation is then reached. In some circumstances, the joint recommendation is presented to the Public Benefit Committee for consideration.
4. If the child is already in formal education, they may be invited to attend the School for assessment as part of the usual recruitment process, and a reference may be sought from the child's current school.
5. By the end of March, the parents/guardians are advised whether their child is to be offered a place at the School and of any Bursary offer. Where a Bursary Award is being offered, this will take the form of a letter from the Bursar, where the terms and conditions of the offer will be explained.
6. Parents/guardians are then required to sign a letter accepting the place at the School and an acknowledgement agreeing to any conditions relating to the Bursary.

## **THE CASE FOR ASSISTANCE**

The Head and Bursar will consider a number of factors when making the judgement as to the justification for support and the extent of such support. In the main, the child's suitability for the School is the first consideration in granting support.



### Suitability

In assessing a child's suitability, attention will be given to the assessment result of each applicant (where appropriate), but potential will also be considered, as well as actual achievement. Bursary funds are limited and those judged most suitable will be given priority as those likely to gain most from the educational provision.

Each pupil to whom support is offered must, in the opinion of the Head, be likely to make sound academic progress following admission and possess the potential to develop the quality of his or her work and benefit from participation in the wider, extra-curricular activities on offer at the School. In normal circumstances, each applicant should meet the School's normal academic requirements. Previous school reports (where relevant) will be consulted for evidence of good behaviour.

### Financial limitations

The amount of the Bursary award is not influenced by the level of the academic ability of the child, but by the extent of need. Each case is assessed on its own merits and awards are made accordingly, subject to the School's ability to fund these within the context of what is viable within the overall budget.

It is recognised that judgements about what sacrifices a family should make to pay school fees will be personal, however, the School has a duty to ensure that all Bursary grants are well focused and so, as well as current earnings, other factors which will be considered in determining the necessary level of grant will include:

- The ability to improve the financial position or earning power of the family, for example, where there are two partners, both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependents or the requirements of their partner's work.
- Opportunities to release any capital - significant capital savings and investments would be expected to be used for the payment of school fees, as would equity values in houses.
- In cases of separation, the contribution made by the absent parent.
- Contribution to household costs by other, wider family members, any adults unrelated to the child or by outside sources.
- Where fees are being paid to other schools (or universities), the School's grant will take into account all these outgoings.



- Acknowledging that others might have a different view, the School considers that the following would not be consistent with the receipt of a Bursary:
  - Frequent or expensive holidays.
  - New or luxury cars.
  - Investment in significant home improvements.
  - A second property / land holdings.

### Other factors

It is recognised that, in addition to financial constraints, there may be other circumstances which should be considered. These include:

- Where a child has siblings at the School.
- Where the social needs of the child are relevant (e.g. may be suffering from bullying at their present school).
- Where a parent/guardian is terminally ill or is unable to secure permanent employment due to poor health.
- Where a separation has resulted in the child having to be withdrawn from the School, adding to the stress of coping with the parents/guardians separating.

## **EXISTING PUPILS - CHANGE IN FAMILY CIRCUMSTANCES**

Within overall budget funding, the School will, in normal circumstances, set aside each year a hardship fund for cases of sudden, unforeseen need or where applications meriting Bursary assistance are received out of the normal calendar cycle for Bursary submission, scrutiny and award. This sum will be set within budgetary constraints.

Parents/guardians with a child at the School whose financial circumstances suddenly change, may apply for a Bursary to the Bursar, explaining their situation. Such awards are subject to the availability of funding and cannot be guaranteed.

## **ANNUAL REVIEW**

All Bursary Awards are subject to repeat testing of parental means each year and may be varied upwards or downwards depending on parental circumstances. Current Bursary holders will be issued with repeat means-testing forms at the beginning of April each year, for return by the end of the month. For those previously in receipt of a Bursary, the Head and Bursar, in making their joint recommendation to the Public Benefit Committee, have the discretion to recommend the reduction or withdrawal of an award not only where a pupil's progress, attitude or behaviour has



been unsatisfactory, but also where the parents/guardians have failed to support the School, for example, by the late payment of any contribution they are making to the fees.

## **CONFIDENTIALITY**

Bursary Awards made by the School are conditional upon the recipient(s) acknowledging that the award is and will remain confidential as between themselves and the School. The School will require recipients to undertake not to disclose either the fact of the award or any of the terms which have been agreed between themselves and the School without first obtaining the prior consent in writing of the Bursar.

## **OTHER SOURCES OF BURSARY ASSISTANCE**

In addition to the School's Bursary fund, there are a number of educational and charitable trusts which provide assistance with tuition fees. In the majority of cases, these are to assist children who are already attending a fee-paying school and due to a change of circumstances may be unable to remain. King's House School encourages parents/guardians to apply for support where it is felt a good case can be made for assistance.

Further information on how to pursue such assistance may be obtained from:

The Bursar

King's House School

68 Kings Road

Richmond

Surrey

TW10 6ES

Email: *Bursar@kingshouseschool.org*

The Educational Trusts Forum

Website: [www.educational-grants.org](http://www.educational-grants.org)

Royal National Childrens' Springboard Foundation

Website: [www.royalspringboard.org.uk](http://www.royalspringboard.org.uk)

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

**New applicant  
Renewal**

**Service required:**

**Home visit  
Zoom/Teams**



**BURSARY ADMINISTRATION LIMITED**

on behalf of

Click or tap here to enter text. **(School)**

## **BURSARY APPLICATION FORM**

**Confidential Statement of Financial Circumstances**

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

Bursary Form July 2024 Fillable

## 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

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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.

Bursary Form July 2024 Fillable

**CHILD OF APPLICATION**

- 1.
- 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) <b>HOME</b> 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.
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.
	Click or tap here to enter text.	Click or tap here to enter text.
h) Are you a Co. Director?		
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)

INCOME	PER MONTH	PER YEAR
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>	Click or tap here to enter text.	Click or tap here to enter text.
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.

RENTAL PROPERTIES (IF ANY, NOT THE FAMILY HOME)	PER MONTH	
<b>INCOME</b>		
RENTAL INCOME	Click or tap here to enter text.	Click or tap here to enter text.
<b>EXPENDITURE</b>		
MORTGAGE	Click or tap here to enter text.	Click or tap here to enter text.
AGENT'S FEES	Click or tap here to enter text.	Click or tap here to enter text.
<b>OTHER EXPENSES:</b>		
Landlord's Insurance	Click or tap here to enter text.	Click or tap here to enter text.
Maintenance Contracts	Click or tap here to enter text.	Click or tap here to enter text.
Ground Rent	Click or tap here to enter text.	Click or tap here to enter text.
Service Charges	Click or tap here to enter text.	Click or tap here to enter text.
Certification	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.
Utility Bills	Click or tap here to enter text.	Click or tap here to enter text.
Repairs/maintenance	Click or tap here to enter text.	Click or tap here to enter text.
Other Expenses	Click or tap here to enter text.	Click or tap here to enter text.

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<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.
PROPERTY TAX (IF SEPARATE AMOUNT)		
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.

Bursary Form July 2024 Fillable

<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:				
i) School scholarships/ bursaries/ allowances	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.
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.

f) 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**