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EDINBURGH STEINER SCHOOL

APPLICATION

FOR

BURSARY

SESSION 2020 / 2021

MUST BE SUBMITTED BY 30TH APRIL 2020

NAME OF PUPIL :

CLASS IN SESSION 2019 / 2020 :

PRESENT SCHOOL :

Information entered on this form will be used by Edinburgh Steiner School Trust Limited and its delegated employees and appointed auditors only, and will be held and used in strict accordance with the provision of the Data Protection Act 2018.

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NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY APPLICATION FORMS

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

Before completing the form, please read these notes carefully, and contact the School Bursars if further information or advice is required. All financial values should be shown in Sterling. Reference to Her Majesty's Revenue and Customs (HMRC) includes the relevant national Taxation Authority.

1. INCOME

a) The **GROSS** annual amount of salaries and wages, including any earnings from overtime, profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay (before deduction of tax, NI, superannuation, etc) for the current or last financial year.

b) Profits from a business or profession – enter the amount of **TAXABLE** income agreed by the HMRC or relevant tax authority for the year in question. Copies of the latest set of accounts should be included.

c) All investment income (e.g. interest of National Savings Bank deposits; dividends, annuities etc) should be entered **GROSS** of tax. If tax was deducted at source, applicants should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed **GROSS**.

d) All social security benefits received should be entered and the type of benefit specified.

e) Court Orders, Legal Separation Agreements and Voluntary Agreements for School Fees - Where a parent is required by a Court order, or a legally 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 bursary 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 a Court Order or separation agreement, applicants are not eligible for a bursary. 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.

2. CAPITAL ASSETS

a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, values as near as possible to the date of submitting the application form.

b) If you run your own business or are partners 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 proportions of the net value of the company.

c) In the case of second homes and/or other properties, these should be included at their estimated current market value, with the amount outstanding on any mortgage scheme. The school reserves the right to make its own enquiries to verify this figure if it thinks it may be incorrect including asking for an up-to-date valuation instructed by, and paid for by, the school.

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CONFIDENTIAL STATEMENT OF FINANCIAL CIRCUMSTANCES

1. CHILD (CHILDREN)

(a)	Full Name(s):	
(b)	Date(s) of Birth:	
(c)	Class of Entry (if not yet enrolled)	

2. PARENT CONTACT DETAILS

		Parent 1	Parent 2
(a)	Names		
(b)	Title		
(c)	Address		
(d)	Post Code		
(e)	Day time Tel		
(f)	Evening Tel		
(g)	Mobile		
(h)	Fax		
(i)	E Mail Address		

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3. PARENTS' OCCUPATIONS

(a)	Employed (insert employer's name, address and phone number)		
	Are you a Director or Shareholder or Proprietor of this Company?	Yes / No	Yes / No
	If "YES" state proportion of Company or Business you and/or your spouse/partner own		
(b)	Self-employed (complete type of business) / partner in partnership		
	If a partner, state your share of partnership income and capital, if any		
(c)	Unemployed		
(d)	Retired		

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4. INCOME (see Note 1)

Please enter below your earnings and other income from all sources for tax year 2019/2020 and your estimated earnings and other expected income for the year to 5th April 2021.

		<i>Parent 1</i>	<i>Parent 1</i>	<i>Parent 2</i>	<i>Parent 2</i>
		ACTUAL 2019/2020	ESTIMATED 2020/2021	ACTUAL 2019/2020	ESTIMATED 2020/2021
(a)	Gross Salary and other similar earnings (including all taxable benefits & Expenses)				
(b)	Taxable Profits of business or Profession				
(c)	Gross pension, widow's pension, state pension etc				
(d)	Gross investment income from: (i) Building Societies and/or banks (ii) Dividends & Interest (other Securities)				
(e)	Gross Rental profits				
(f)	Social Security benefits: i) Child Benefit ii) Child Tax Credit iii) Working Families' Tax Credit iv) Income Support v) Job Seekers' Allowance vi) Disability Benefit vii) Other (please specify)				
(g)	Separation or Maintenance Allowance				
(h)	Is there a Court Order or Separation Agreement?	YES/NO £.....	YES/NO £.....	YES/NO £.....	YES/NO £.....
		If yes, please state annual amount payable for school fees (if applicable) and by whom.			

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(i)	Redundancy, employment, separation or regular sum payments				
(j)	Any other income not included in (a) to (i) above (please specify)				

5. CAPITAL ASSETS (See note 2)

		<i>Parent 1</i>	<i>Parent 2</i>
(a)	Approximate market value of all investments		
	i) Building Society/Bank	£.....	£.....
	ii) Deposits		
	iii) Shares, Unit Trusts etc	£.....	£.....
	iv) PEPs, ISAs	£.....	£.....
	v) Life Assurance Bonds & Policies including endowments	£.....	£.....
	vi) Other (Please Specify)	£.....	£.....
(b)	Bank or Building Society accounts		
(c)	Approximate market value of any other assets e.g. Insurance Policies maturing this year or the last five years		
(d)	Net worth value of any businesses which you own or share		
(e)	Approximate market value of any other properties owned either at home or abroad (excluding main residence)		

5. CAPITAL LIABILITIES

		<i>Parent 1</i>	<i>Parent 2</i>
(a)	Mortgage: Amount outstanding on property (excluding main residence)		
(b)	Second Mortgages		

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6. VERIFICATION

In order for us to assess your eligibility and allocate available bursary resources both fairly and according to need, it is **essential** to verify your application with appropriate original documentation. Original documents will be returned to you as soon as possible.

Please therefore submit the following items where appropriate and tick the box to indicate those you are enclosing.

	Employed	Parent 1	Parent 2
(a)	P60(s) and/or P45(s) for 2019/2020 when received		
(b)	March 2020 Pay Advice slip (s)		
(c)	Certificates of dividends received from your own company		
	Unemployed		
(d)	Summary of Social Security Benefits received (this information must be provided by the benefits agency)		
	Self Employed		
(e)	Full set of business Report and Accounts (including Balance Sheet) - two latest available accounts (these should be verified by an appropriate third party, e.g. your accountant)		
(f)	Full details of personal drawings or salary payments from business (this should be verified by an appropriate third party, e.g. your accountant)		
	Miscellaneous		
(g)	Working Families' Tax Credit letter of award		
(h)	Child Tax Credit letter of award		
(i)	Child benefit letter of award		
(j)	Details of any pensions or other state benefits received		
(k)	P60(s) for any occupational pensions received		
(l)	Details of maintenance payments received		
(m)	Details of any dividends received		
(n)	ALL Bank & building society statements for 1 April 2019 To 31 March 2020 (12 months)		
(o)	Full details of rental income received		
(p)	Annual mortgage statement(s) (excluding main residence)		
(q)	Other (please specify)		

PLEASE RETURN YOUR APPLICATION AND ALL THE REQUIRED SUPPORTING PAPERS TO THE BURSAR NO LATER THAN 30th APRIL 2020.

COMPLETE SUPPORTING DOCUMENTATION MUST BE ENCLOSED WITH YOUR APPLICATION AND CANNOT BE PROVIDED AT A LATER DATE. (EXCEPT 2019/2020 P60 WHICH SHOULD FOLLOW AS SOON AS POSSIBLE)

APPLICATIONS WITHOUT COMPLETE SUPPORTING DOCUMENTATION WILL BE RETURNED TO YOU MARKED "INCOMPLETE INFORMATION". AND YOU WILL HAVE AN OPPORTUNITY TO RE-SEND. HOWEVER, APPLICATIONS (INCLUDING THOSE THAT HAVE TO BE RE-SENT FOR DOCUMENTATION REASONS) WILL NOT BE CONSIDERED AFTER THE CLOSING DATE.

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DECLARATION

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 financial situation and overall circumstances.

We/I understand that if we/I are/am offered a bursary for our/my child :-

- (a) Our/my child's fees account with the school will be credited for the 2020/2021 session with the full amount of the bursary at the beginning of the academic year.**
- (b) We/I understand that any bursary is subject to annual review and that 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) I/We must report to the school immediately any material change in the financial position declared.**
- (d) The bursary may be withdrawn or reduced if:-**
 - (i) We/I fall more than sixty days in arrears in respect of any amount due and owing to the school.**
 - (ii) There is a material change in our/my financial circumstances including the inheriting of money from any source from the date of this application to the end of the school session to which the bursary relates.**
 - (iii) The school deems that its resources are insufficient to maintain the level of bursary.**
- (e) The bursary will be withdrawn and past payment reclaimed if we/I have fraudulently, knowingly and/or recklessly withheld information about my/our financial circumstances or provided false information.**
- (f) I/We confirm we have not inherited any money, from any source within the preceding twelve months.**
- (g) We/I confirm that school fees for the child/children for whom we now apply for a bursary in August 2020 have not been paid either in whole or in part for the present school session 2019/2020 by any third party (including for example by a grandparent or by a Trust) either directly by that third party to the school or by the third party to yourselves for onward transmission to the school.**

Signatures

..... Date
(Parent 1)

..... Date
(Parent 2)

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

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Divorced / separated / widowed / other **(if 'other' please provide clarification).**

If divorced, separated or widowed please provide documentary evidence if you have not already done so.