**Application for Assistance with School Fees**

**For the School Year 2019/20**

**New Bursary Applicants**

**Declaration of Income and Assets**

**(All Bursaries are awarded at the Absolute Discretion of the School)**

**Please Do Not Enclose Original Documents - Photocopies Are Acceptable**

Truro School, Trennick Lane, Truro, Cornwall TR1 1TH



For Office Use Only

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**Pupil’s Name Pupil Ref**

Address for correspondence (if applicable)

Pupil’s permanent address

**Parent(s)/Applicant(s) Details**

Full Names(s) of Parent(s)/Applicant(s)

**Declaration**

\*delete as applicable

After reading the attached notes and completing the application form the following declaration should be signed by both Parents/Applicants:

We/I\* have read the notes and have made a complete 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 school:

1. Our/my\* child’s fees account with Truro School will be credited termly with the amount of the Bursary.
2. We/I\* must complete a declaration of our/my\* financial circumstances on the form sent to me/us\* by Truro School and supply all relevant supporting evidence by the return date indicated at any time in the future it is required during the course of the pupil’s education. We/I\* also agree to provide to the School any further information as requested, in connection with this application.
3. The Bursary may be withdrawn and past payment reclaimed if:
* There is a breach of the Terms and Conditions attached to the acceptance of a place for our/my\* child at the School.
* We/I\* have knowingly and/or recklessly provided false information.
* We/I\* have failed to return the annual declaration of our/my\* financial circumstances by the return date indicated.
* We/I\* have failed to produce any additional information required by the School to evidence our/my\* financial circumstances.
* There is, in the view of the Headmaster, either unsatisfactory work or conduct.
1. If our/my\* child is withdrawn without giving the requisite notice under the Terms and Conditions, one full terms’ fees will be due.
2. The school may wish to visit your home address to discuss your application for support. Please indicate whether you are happy to receive a visit from the school's representative. Yes / No If this is not possible, please give reasons.
3. We/I\* understand that the award of a Bursary for the year 2019/20 places no obligation on the School to continue the support in subsequent years, or at the same level.
4. I confirm that I have attached all documents outlined in Paragraphs 8 and 9 of the Notes for Guidance
5. The information on this form is used solely for the processing of bursary applications. It is shared only amongst the small number of staff involved in the application process (The Finance Office, The Bursar, Head and Admissions Director) and is only kept for as long as this year’s bursary application process is running, including appeals. Your application form will be returned to you, or securely destroyed within 24 months of receipt of the application. We may share your information with a UK based third party for checking and processing. Your rights in regard to this information are included in our privacy notice, which can be found on our website at [www.truroschool.com/truro-senior-school/senior-school-policies/](http://www.truroschool.com/truro-senior-school/senior-school-policies/). If you have any questions regarding the bursary process, please contact bursar@truroschool.com.

Signature: Father/Applicant\*\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Mother/Applicant\* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_

If only one parent signs the above declaration, please state reason as follows: Divorced / Separated / Widowed / Other\* (please delete as necessary)

**Details of Parent(s) / Applicant(s) Income**

**1 Employment Details**

**Name of Father / Applicant**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unemployed Employed Self-Employed

Profession, business or trade \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name and address of employer or address of business \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Are you a director or proprietor of this company? Yes No

If Yes, please state proportion of the Company or business you own \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Name of Mother / Applicant**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unemployed Employed Self-Employed

Profession, business or trade \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name and address of employer or address of business \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Are you a director or proprietor of this company? Yes No

If Yes, please state proportion of the Company or business you own \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2 Is there a Court Order or Separation Agreement for School fees?**

Yes No If Yes, please state the amount to be paid in respect of the School year 2019/20 \_\_\_\_\_\_\_\_\_\_\_\_\_

**3 Do you have an insurance policy especially to pay for School fees?**

Yes No If Yes, please provide details \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**4 Are any School Fees paid wholly or in part by a Trust Fund or a School Fees Scheme?**

 Yes No If Yes, please state the total amount due to be paid in the School year 2019/20 for each child

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5 Do you receive or have an offer to receive any other financial assistance to pay School fees for any of your children? (E.g. Grandparents / other relatives / friends etc.)**

Yes No If Yes, please state the total amount due to be paid in the year 2019/20 for each child

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**6 Do you receive a Scholarship or Bursary other than from Truro School to pay School fees?**

 Yes No If Yes, please state the amount to be paid in 2019/20 £\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 and enclose documentary evidence

**7 Please advise of any changes in financial circumstances envisaged for 2019/20**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**8 Parent(s) / Applicant(s) Assets**

**Please state all values at date of application. See Guidance notes at the end of the form for details of which documents should be included with the application**

|  |  |  |
| --- | --- | --- |
|  | Father £ | Mother £ |
| Principal Residence—Estimated Value |  |  |
| Owned or Rented |  |  |
| If rented, what is your relationship to owner? |  |  |
| When did you buy the property? |  |  |
| What was the purchase price? |  |  |
| Outstanding mortgage |  |  |
| Other property (e.g. overseas, second home, timeshare, etc.) |  |  |
| When did you buy it? |  |  |
| What did you pay? |  |  |
| What was the purchase price? |  |  |
| Any outstanding loans? |  |  |
| Bank accounts (e.g. building society, bank deposits, national savings) |  |  |
| Stocks, shares and bonds |  |  |
| Net worth of business |  |  |
| Any other assets |  |  |
| Share and Trust Funds |  |  |
|  **Total** |  |  |

**9 Parents’ / Applicants’ Income**

Please complete the table below showing income from all sources, before deduction of tax, for the financial years indicated (i.e. 6th April to 5th April). Enter amounts in whole pounds (ignore pence) or NIL in all places where applicable. See Guidance notes at the end of the form for details of which documents should be included with the application

|  |  |  |
| --- | --- | --- |
|  | **2017/18 Actual** | **2018/19 Estimate** |
| 1. Gross Income

 **Father** |  |  |
|  Benefits in Kind |  |  |
|  **Mother** |  |  |
|  Benefits in Kind |  |  |
| 1. Superannuation Contributions (if not included above)

 **Father** |  |  |
|  **Mother** |  |  |
| 1. Additional Voluntary Contributions (if not included above)

 **Father**  |  |  |
|  **Mother** |  |  |
| 1. Pension Received
 |  |  |
| 1. Child Benefit
 |  |  |
| 1. Income support or income based jobseeker’s allowance
 |  |  |
| 1. Contribution based jobseeker’s allowance
 |  |  |
| 1. Working Tax Credit
 |  |  |
| 1. Child Tax Credit
 |  |  |
| 1. Widowed Mother’s Allowance
 |  |  |
| 1. Disability Living Allowance
 |  |  |
| 1. Incapacity Benefit
 |  |  |
| 1. Other Social Security Benefits
 |  |  |
| 1. Housing Benefit (normally deducted from h) above and paid direct to the landlord/building society
 |  |  |
| 1. Council Tax Benefit
 |  |  |
| 1. Separation or maintenance for self or child (receipts)
 |  |  |
| 1. Building Society interest received (gross)
 |  |  |
| 1. Other Investment Income (gross)
 |  |  |
| 1. Income from property
 |  |  |
| 1. Any Other Income
 |  |  |
|  **Total** |  |  |

**10 Dependent Children**

Give details in respect of all children wholly or mainly dependent on the Parent(s)/Applicant(s), including the child for whom the application is made.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Name** | **Date of Birth** | **Source of unearned income including Trust income** | **Children’s gross unearned income 2017/18** | **Estimate 2018/19** |
| **Bursary Applicant** |  |  |  |  |  |
| **Other Dependent Children:** |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  | **Total** |  |  |  |

**Notes For Guidance On Completing This Form**

These notes explain what information is required to be disclosed in each section.

The number of each note corresponds with the section to which it relates.

Please read these notes carefully before attempting to complete the application form.

If you require any assistance with this form, please contact the Finance Manager on 01872 246072.

**Parents / Applicants**

 Are defined as:

1. The legal 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

ii. 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

iii 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

iv The person with whom the child resides in accordance with either:

* A subsisting Residence Order made under Section 8 of the Children Act 1989; or
* 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

v. 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

vi. 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.

**2 Court Orders, Legal Separation Agreements And Voluntary Arrangements 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 the Bursary to be awarded. This is irrespective of whether or not the Order or agreement is being complied with. Where the whole amount of fees is required to be paid by virtue of a Court Order or separation agreement applicants are not eligible for a Bursary.

**3 Insurance Policies For School Fees**

If an 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 Bursary. 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.

**4 Fees Paid By Trust Fund Or School Fees Scheme**

Please state the amount receivable in the year 2019/20 for each child for whom payment will be received. If fees are wholly paid by a trust fund or under a school fees scheme the pupil is not eligible for a Bursary.

**5 Other Financial Assistance**

Please give details of any offers you may have received from family, friends or organisations, to assist with the payment of school fees.

**6 Scholarship Or Bursary**

Please give details of any scholarships or bursaries awarded for the year 2018/19 including the name of the recipient and the full value of the awards, as well as any documentary evidence.

**7** Please specify any future changes to your circumstances of which you are aware.

|  |  |  |  |
| --- | --- | --- | --- |
| **8** | **Parents’ / Applicants’ Assets** |  | **Please enclose**: |
| a-f | The current market value of your principal residence.Parents should estimate the current market value.If you live in rented accommodation please give the name of the landlord and your relationship to them e.g. tenant, employee, family member etc. |  | Bank or building society statement of outstanding mortgage.Details of Council Tax banding relating to the property.Original purchase documentation. |
| g-k | In the case of second homes and / or other properties, these should also be included at your estimated current market value, no allowance will be made for any outstanding mortgage. |  | Details of Council Tax banding relating to the property.Original purchase documentation. |
| l | The capital sum of any monies on deposit with any bank, deposit taker, building society or National Savings. |  | Documentary evidence produced by your bank, building society or National Savings. |
| m | Investments in stocks and shares valued as near as possible to the date of submitting the application form. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company. |  | Schedule showing share holdings and values attributed to each holding. A letter from the company auditors stating the net asset value of the company as at the end of the last accounting year and the proportion of that attribution to the shares held. |
| n | If you run your own business or are partners in a business then the accounts must show the net worth of the business. |  | Copy of the accounts as prepared by your accountant and if possible having been agreed with the inland Revenue. |
| o | Any other assets. |  | Appropriate evidence. |
| p | Share and Trust Funds. |  | Appropriate evidence. |

**9 Parent(s) / Applicant(s) Income**

 2017/17 Actual: to be completed for the tax year ended 05/04/18

 2018/19 Estimate: to be completed for the tax year ending 05/04/19 **Please enclose:**

|  |  |  |  |
| --- | --- | --- | --- |
| ai | Gross Income should include:The gross amount of salaries and wages including any earnings from profit related pay, part-time employment and any sum received as bonus, commissions etc., statutory sick pay, statutory maternity pay. |  | Copies of the last 12 months banks statements.Form P60 or latest copy payslip |
| ii | Profits from a business or profession at the amount of gross income agreed by the Inland Revenue for the year in question (deductions should be made only in respect of capital allowances, losses or stock relief). |  | Statement or letter from Inland Revenue confirming the amount shown. Self-Assessment forms for previous years and estimates for the current year. Copy of Schedule E tax or Notice of Coding from the Inland Revenue. |
| iii | Benefits in kind (free or subsidised housing, meals or cars etc.) at the amount agreed for tax purposes. |  | Form P60 or latest copy payslip or letter from employer stating amount. |
| iv | Members of HM Forces should include the amount of any Services Education Allowances, which they receive. Parents in other occupations should include any similar sum. |  | Form P60 or latest copy payslip. |
| b, c | Superannuation and AVCs: If parents enter an amount of earned income which is net of employee’s superannuation or other pension contributions including additional voluntary contributions, paid during the year, the total of those employees contributions should be entered. |  | Form P60. |
| d | Pensions received. |  | Appropriate evidence. |
| e-o | All Social Security received should be declared. |  | Appropriate evidence. |
| p | All receipts relating to child benefit maintenance payments, separation allowances and sums in respect of child support maintenance should be declared. |  | Appropriate evidence. |
| q | Building Society interest must be disclosed as being the gross amount received. |  | Building Society interest certificates. |
| r | All other investment income (e.g. interest or National Savings Bank deposits, dividends, annuities) should be entered GROSS of tax. If tax was deducted at source, parents would add in the amount of tax paid or tax credit notified. |  | Share dividend vouchers and interest certificates. |
| s | Income from letting or sub-letting of property should be declared at the amount of the NET profit agreed with the inland Revenue. |  |  |
| **10** | **Dependent Children** |  |  |
| a | You should list all dependent children. |  |  |
| b | 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 then gross amount received before deduction of tax. |  |  |
| **Please use the space below for any additional information you wish to provide or to continue the answers to any of the questions in the application form clearly indicating the question to which the information applies**. |