



## **GUIDANCE NOTES FOR COMPLETION OF BURSARY APPLICATION FORM**

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. 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.

All financial values should be shown in Sterling. References to Her Majesty's Revenue & Customs (HMRC) include the relevant national Taxation Authority.

### **1. CHILD'S DETAILS**

Provide the child's FULL LEGAL name as per birth certificate.

### **2. PARENT/GUARDIAN DETAILS**

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:
  - i. a subsisting residence order made under section 8 of the Children Act 1989; or
  - ii. 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.
- If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form.



### **3. PARENTAL RESPONSIBILITIES**

The details OF ALL parents or guardians that have legal responsibility for the child should be provided. If you would like to discuss this, please contact the Bursary [bursar@channing.co.uk](mailto:bursar@channing.co.uk)

### **4. INCOME - PER ANNUM**

- 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 etc, statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) – at the amount agreed for taxable purposes.
- b) Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances). Copies of the latest set of accounts should be included.
- c) State full annual amount of all pensions currently being received annually before tax.
- d) All social security benefits received should be declared and type of benefit specified.
- e) Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; and royalties and all other sources including entertainment and travel allowances etc.
- f) All other Investment income (eg 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.
- g) 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 (eg 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 are required to be paid by virtue of a 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.
- h) Any other income not included in the above categories should be declared.

### **5. 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.
- b) Investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- c) The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable. In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

### **6. OUTGOINGS - MONTHLY**

- a) Enter capital as well as interest payment on a mortgage for the principal residence.
- b) Enter monthly payments for rented property for the principal residence
- c) Enter annual superannuation contribution of (if applicable) payments to other Pension Schemes.
- d) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the



loan).

e) Enter any other large monthly outgoings

## **7. DEPENDENTS**

You should include the name of the child for whom you are now applying and amount of any bursary currently being received. Enter in other columns any other of your children who are at a school, university or other educational institution that attracts a county/borough grant:

- i) The figures to be inserted for current educational bursary or grant refer to the current academic year.
- ii) Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum.
  
- iii) Insurance Policies for School Fees – 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.
- (iv) 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.
- v) Where the child has any unearned income, eg 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. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

## **8. OTHER DEPENDENTS**

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, and relationship to that dependant.

## **9. ANY OTHER RELEVANT INFORMATION**

Please enter, and add a separate sheet if necessary, any details which may affect the assessment of a grant, eg a significant change in income or outgoings for the coming year.