



**BURSARY APPLICATION FORM**

**Confidential Statement of Financial Circumstances**

**1. Child**

- a) Full Names .....
- b) Date of Birth .....
- c) Term / Year of Entry .....

**Notes**

**2. Parents**

**Father / Stepfather**

**Mother / Stepmother**

- a) Names .....
- b) Title .....
- c) Address .....
- d) Occupation .....
- e) Employment Status (*please circle*)      Retired / Self Employed /  
Employed / Unemployed                      Retired / Self Employed /  
Employed / Unemployed
- f) Employer Details .....
- g) Are you a Director or Proprietor      YES / NO                      YES / NO  
    (*% Share Holding*)
- h) Daytime Telephone .....
- Evening Telephone .....
- Mobile .....
- Email Address .....



### 3. Income *Please use annual amounts*

Notes

	Father £	Mother £
a) Gross salary and other earnings	.....	.....
b) Business or professional profits	.....	.....
c) Gross pensions	.....	.....
d) Gross investment income	.....	.....
e) Gross rents received	.....	.....
f) Benefits received	.....	.....
g) Maintenance received	.....	.....
h) Court order / Separation agreement - School fees Receivable	.....	.....
i) Benefits in kind received free	.....	.....
j) Any other income	.....	.....
<b>TOTAL</b>	.....	.....

### 4. Outgoings *Please use annual amounts*

	Father £	Mother £
a) Tax on income above	.....	.....
b) NI contributions	.....	.....
c) Pension contributions	.....	.....
d) Mortgage payments on main residence	.....	.....
e) Endowment payments	.....	.....



## 4. Outgoings *(continued)*

Notes

	Father £	Mother £
f) Other insurances	.....	.....
g) Rent – Main residence	.....	.....
h) Rates and utilities	.....	.....
i) Other interest payable	.....	.....
j) Loan repayments	.....	.....
k) Food and subsistence	.....	.....
l) Clothing	.....	.....
m) Vehicle costs	.....	.....
n) Leisure	.....	.....
o) Holidays	.....	.....
<b>TOTAL</b>	.....	.....

## 5. Capital Assets *Approximate market value*

	Father £	Mother £
a)		
i. Bank/Building Society balances	.....	.....
ii. Equity/Bond values	.....	.....
iii. PEPs / ISAs TESSAs	.....	.....
b) Pension schemes	.....	.....
c) Value of main residence	.....	.....
d) Value of other properties	.....	.....
e) Value of vehicles	.....	.....
f) Net worth of Business	.....	.....



## 5. Capital Assets *(continued)*

Notes

	Father £	Mother £
g) Net worth of business	.....	.....
h) Redundancy or other employment settlements due	.....	.....
i) Insurance settlements due	.....	.....
<b>TOTAL</b>	.....	.....

## 6. Capital Liabilities

	Father £	Mother £
a) Mortgage amount outstanding	.....	.....
Mortgage final payment date	.....	.....
b) i. Loans	.....	.....
ii. Credit Cards	.....	.....
iii. Finance leases	.....	.....

## Summary

	Father £	Mother £
Income	.....	.....
Deduct outgoings	.....	.....
<b>TOTAL</b>	.....	.....
Capital assets	.....	.....
Deduct Capital Liabilities	.....	.....
<b>TOTAL</b>	.....	.....

*Please indicate why net assets cannot be converted or used to pay school fees*



**7. Dependent Children**

**Notes**

	<b>Child 1</b>	<b>Child 2</b>
a) Forename	.....	.....
b) DOB	.....	.....
c) Current school	.....	.....
d) Boarding or day	.....	.....
e) Annual fees	.....	.....
f) Compulsory extras	.....	.....
g) Uniforms	.....	.....
<b>SUB TOTAL (a – g)</b>	.....	.....
h) Fees covered by:		
i. School Scholarships / Bursaries / Allowances	.....	.....
ii. Annual sum arising from Lump Sum Payment Scheme	.....	.....
iii. Educational allowances	.....	.....
iv. Educational insurances	.....	.....
v. Family assistance	.....	.....
vi. Other assistance	.....	.....
i) Child's income	.....	.....
<b>SUB TOTAL (h – i)</b>	.....	.....
<b>TOTAL (a – g)</b>	.....	.....
<b>LESS (h – i)</b>	.....	.....



## 7. Dependent Children *(continued)*

Notes

	Child 3	Child 4
a) Forename	.....	.....
b) DOB	.....	.....
c) Current school	.....	.....
d) Boarding or day	.....	.....
e) Annual Fees	.....	.....
f) Compulsory extras	.....	.....
g) Uniforms	.....	.....
<b>SUB TOTAL (a-g)</b>	.....	.....
h) Fees covered by:		
i. School Scholarships / Bursaries / Allowances.....	.....	.....
ii. Annual sum arising from Lump Sum Payment Scheme	.....	.....
iii. Educational allowances	.....	.....
iv. Educational insurances	.....	.....
v. Family assistance	.....	.....
vi. Other assistance	.....	.....
i) Child's income	.....	.....
<b>SUB TOTAL (h – i)</b>	.....	.....
<b>TOTAL (a – g)</b>	.....	.....
<b>LESS (h – i)</b>	.....	.....



## 8. Other Dependents

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## 9. Any other relevant information

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## 10. Documents to be supplied

*Please supply originals of the following documents:*

- Last 3 payslips
- Last P60
- Latest audited accounts *(if appropriate)*
- Latest management accounts *(if audited accounts are more than 9 months old)*
- Latest self-assessment tax calculation *(if appropriate)*
- Schedule D self-employment income declaration *(if appropriate)*
- 3 months' bank statements
- Proof of value of investments *(may include internet valuation)*
- Latest pension and endowment valuation
- Benefit letters *(if appropriate)*
- Latest mortgage statement *(on all properties if appropriate)* / rent agreement
- Latest loan statements
- Contents insurance schedule
- Legal financial agreements

*Any other appropriate documents to support your application*

ALL DOCUMENTS WILL BE RETURNED SECURELY ONCE THE APPLICATION HAS BEEN PROCESSED.  
YOU WILL BE NOTIFIED THE FINAL RESULT BY THE SCHOOL DIRECTLY.



## 11. Declaration

After having read the attached notes, 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 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:

Father / Stepfather ..... Date .....

Mother / Stepmother ..... Date .....

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

Divorced / Separated / Widowed/ Other (*state reason*)

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Please return this form together with any other appropriate documents to support your application to:

Samantha Beschizza  
 Bursar  
 St Margaret's School  
 18 Kidderpore Gardens  
 Hampstead  
 London NW3 7SR