



# RGS Prep School

## Guidance on completing a Bursary Scheme Application Form

For help with completing the form please call 01483 880610

Both parents where applicable should complete the Bursary Scheme Application form and enclose all relevant financial details. The completed form needs to be submitted before the entrance examination. Documentary support **MUST** be provided to support **ALL** the entries on the form.

Where there is insufficient space on the form for your answers please use additional pages.

Parents who are divorced or separated should enclose a copy of any Order for care, control, custody or maintenance.

If a parent has a new partner, the details of the family unit the pupil lives with should be included on the Bursary Scheme Application form even if the new partner does not have specific financial responsibility for the pupil. In addition we are likely to assess the financial information from the parent the pupil does not live with.

The following notes correspond with the application form and are provided for guidance when completing your details.

### 1. Child

Please provide full details of your son.

### 2. Parent

Please provide full details of both parents if applicable and of any significant personal circumstances that may affect your application.

### 3. All Income

Please enter **total income** from **all sources** for the last full Financial Year ended 5<sup>th</sup> April.

Income should be entered gross before deduction of tax, pension contributions etc.

If there is likely to be a significant difference in income from the last complete tax year, please provide further information at Point 10 on the Bursary Scheme Application form.

Documentary evidence **MUST** be enclosed to support earned income figures. This may take the form of P60 Certificate(s), Inland Revenue self-assessment return(s), a copy of business accounts or a statement from your accountant. It will not be possible to finalise an assessment in the absence of this supporting documentation.

Please include taxable benefits in kind from your employment (e.g. free or subsidised housing, meals, cars etc.) at the amount agreed for tax purposes.

Interest from banks and building societies should be declared, as well as any dividends or other income from investments.

Please include **all** government allowances/benefits on your form. Please list them individually, and as with other sources of income, include support for the figures included.

Rental income from the letting or sub-letting of property should be included including amounts from the letting of rooms in the house you live in.

Parents **receiving** maintenance payments or separation allowance under a Court Order or Separation Agreement should enter the amount that should be received under the Agreement or Order, and also enter the amount of any tax recovered on the payment. Where such a Court Order exists, a copy of that Order should be enclosed, and if the Court Order is not being complied with, the circumstances should be outlined in a covering letter. Any amounts received under a voluntary arrangement should also be included.

#### 4. **Outgoings**

If you pay mortgage interest on more than one property, for example on any rental properties, please list the interest on each property separately. We need the annual figure here.

Parents **paying** maintenance payments or separation allowance under a Court Order or Separation Agreement should enter the amount that should be paid under the Agreement or Order. Where such a Court Order exists, a copy of that Order should be enclosed. If the Court Order is not being complied with, the circumstances should be outlined in a covering letter. Any amounts paid under a voluntary arrangement should also be included.

#### 5. **Liabilities**

Please include all mortgages, listed individually by property when more than one is owned, including any rented out. A statement of the mortgage interest paid in the last financial year from the Lender (e.g. bank or building society) should be included for each property.

#### 6. **Assets**

Please include the approximate value of any investments held under 6(a) – including ISAs, shares, loan stock etc. with full support. Any investment properties other than houses should be shown here too, complete with their full address and post code.

Please include an estimate of the current value of any houses owned under 6(b), including those held for rent or investment, listed by property. There is no need for a formal valuation. Please include the full address and post code of all properties. Any mortgages on those properties are included under 5(a).

Please list all up to date balances of any bank Bank/Building Society accounts under 6(c). Statements covering the last **3** months **MUST** be provided for **ALL** accounts.

7. **Dependent Children**

Include details of all children (other than the child for whom the application is made) still wholly or mainly dependent on you.

School Fees for any other independent schools should be for the current academic year with details of any associated bursary award. It should not be assumed bursary support for one pupil will automatically provide bursary support for another at the same or another school.

8. **Other Dependent Relatives**

Include details of any relatives wholly or mainly financially dependent on you and to help us understand your situation better please explain the nature and approximate annual value of your support.

9. **Change of Circumstances**

If your income in the current financial year is likely to be significantly lower than for the year shown, please explain why and give an estimate of your income for the current financial year.

10. **Any Other Relevant Information**

It is expected that both parents would work and contribute to school fees if applying for bursary support. If this is not the case please include an explanation as to why a particular parent is not working.

Where a parent is self-employed rather than in employment please give background details – eg length of time and reason for self-employment

If there is any possibility of funds being provided by another family member or through the release of capital this should be considered and included on the Bursary Scheme Application form.

Please give details of any other factors you feel should be taken into consideration when assessing your application.

Please complete the form as fully and honestly as possible. If information is found to be false or misleading at a later stage, the school reserves the right to withdraw and reclaim a bursary. If you would like help in completing the form please call 01483 880610 for telephone assistance or to book an appointment with one of our staff.