

# BURSARY APPLICATION FORM

## Confidential

Please make sure you have read both the Bursary Policy and the Guidance Notes before completing this Application Form. Should you have any difficulty in completing this Application Form, please contact the Bursary.

This Application Form plus Appendix 1 (if relevant) should be completed in full and sent with all relevant supporting documentation to: The Bursar, Sherborne Girls, Bradford Road, Sherborne, Dorset, DT9 3QN or bursar@sherborne.com.

The deadlines for submission of the application can be found on the school website. Late applications will reduce the likelihood of an award being made. Where parents are divorced or separated and both retain parental responsibility for their daughter, a single application on behalf of the pupil, including all parental information, is still expected.

**Please indicate why you are making this application. Select all that apply.**

- Our/my daughter is registered for a place at Sherborne Girls.
- Our/my daughter has an offer of a place at Sherborne Girls.
- Our/my daughter is applying for a Scholarship.
- Our/my daughter is already at the School but there has been a change in our circumstances.
- Annual Review in respect of a current bursary award.

If a bursary would be required in order for your daughter to attend Sherborne Girls, please state here the total level of funding that you would require as a percentage of the fee: \_\_\_\_\_

<b>1 The Candidate</b> <i>Please tell us about your daughter.</i>	
a	Full Name <i>(Please underline surname)</i>
b	Nationality
c	Will your daughter require a visa to attend the school?
d	Date of Birth <i>(dd/mm/yyyy)</i>
e	Place of Birth
f	When will/did your daughter enter Sherborne Girls?
g	Which house is your daughter in? <i>(if known)</i>
h	Was the candidate's mother, grandmother or aunt at Sherborne Girls? <i>(This may make the candidate eligible for a Sherborne Old Girls Bursary)</i>
i	If YES, please provide details of name and relationship to candidate

2 The Parents <i>Please tell us about yourselves</i>		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
a	Full Name <i>(Please underline surname)</i>		
b	Title <i>(Mr/Mrs/Dr/Other)</i>		
c	Relationship Status		
d	Nationality		
e	Date of Birth <i>(dd/mm/yyyy)</i>		
f	Home Address <i>(including post code)</i>		
g	Day Time Telephone		
h	Evening Telephone		
i	Mobile		
j	Email Address		

3 The Parents' Occupations <i>Please tell us about your work</i>		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
<i>Are you (please tick all relevant categories):</i>			
a	Employed? <i>If YES, complete section 3b. Use an additional sheet if you have more than one employer.</i>		
	Self-employed <i>If YES, complete section 3c</i>		
	Unemployed/Retired/Other? <i>If YES, complete section 3d</i>		
<i>If employed, please give:</i>			
b	Job title		
	Employer's Name		
	Employer's Address		
	Description of Employer's Business		

If self-employed, please give:		
c	Job title	
	Name of Business	
	Address of Business	
	Are you a director/shareholder/proprietor of this company or business?	
	If YES state proportion of company or business, you own.	
If unemployed/retired/homemaker/other, please give:		
d	Your current status	
	If unemployed, the start date of your redundancy, the nature of your previous employment and your previous earnings If homemaker, please provide details of any previous employment and current plans to return to work (if any)	

4 Property, Savings and Other Assets <i>Please tell us about the assets that you own</i>		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
a	Do you own the home disclosed at section 2(f)?		
	If YES, please give approximate current market value of your home.		
	Please specify freehold or leasehold and, where appropriate, acreage; give number of bedrooms and reception rooms.		
Approximate current market value of other possessions:			
b	Car/s		
	Make and Year of manufacture		
	House contents/other items or collections <i>(specify items of particular value)</i>		
	Description of items		
c	Approximate current market value of your interest in any other property, land or buildings either in the UK or abroad in total <i>(please complete specific details at Appendix 1)</i>		

Cash at bank/building society:		
d	Current account	
	Savings accounts	
Approximate current market value of all investments:		
e	Investments held in bank or building society deposits/ National Savings accounts	
	Equity investments, ( <i>shares, unit trusts, corporate bonds and other securities</i> ) and Government stocks	
	ISAs or equivalent	
	Any other assets held as investments	
f	Net worth/value of any businesses which you own or share	
g	Redundancy or other termination payments	
h	Monies that are owed to you	
Approximate current market value of any other assets:		
i	Insurance policies maturing in the next 5 years	
	Share options	
	Assets held by or on behalf of the candidate	
j	<b>TOTAL ASSETS</b>	

## 5 Mortgages, Borrowings and Loans

Please give details of any amounts you owe to banks and other lenders

Parent #1 (e.g. Father)

Parent #2 (e.g. Mother)

Mortgage Details in respect of your home:		
a	Amount outstanding on principal residence disclosed at Section 4a	
	Final payment date	
	Is this a repayment or interest only mortgage?	
b	Outstanding mortgages on all other properties declared at Section 4c (please complete full details at Appendix 1)	
What is the total amount you owe in respect of:		
c	Bank Overdrafts	
	Credit cards and store cards	
	Student Loans	
	Loans from family members	
	Other loans	
d	<b>TOTAL LIABILITIES</b>	

6	Net Assets	Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
a	TOTAL Property, Savings and Other Assets (shown at section 4)		
b	TOTAL Borrowings and Loans (shown at section 5)		
c	<b>TOTAL NET ASSETS</b>		

d Please explain below any reasons why net assets cannot be sold or converted into cash to pay school fees. Please continue on an additional sheet if necessary:

**7 Income**

Please complete these details for a full 12 months based on your current income. Enter all amounts in whole numbers (British £) or put 0 if relevant. Supporting documentation is required (see section 17)

Parent #1 (e.g. Father)

Parent #2 (e.g. Mother)

Income from all employments:		
a	Gross salary (excluding bonus, benefits in kind and expenses)	
	Annual bonus	
	Is this bonus guaranteed?	
Income from self-employment:		
b	Taxable income from self-employed trade or profession	
	Dividend income from owner-managed businesses	
c	Gross pension, widow's pension or state pension	
Gross investment income from:		
d	Building Societies /Banks	
	Dividends and interest (other securities)	
Income from all other properties:		
e	Rental profit as disclosed on your tax return (and shown at Appendix 1)	
f	Total Social Security benefits	
	Please list all benefits you receive:	
Separation or Maintenance Allowance		
g	Is there a Court Order or Separation Agreement?	
	If YES, does this specify any arrangements for the payment of school fees?	
	If YES, please state the amount to be paid in respect of each school year and by whom.	
h	Benefits in Kind provided by reason of employment or business not already included in (a) above (e.g. house, car, health insurance)	

Any other income or gains not included in (a) to (h) above:		
i	Income from other assets or trusts	
	Income from insurance policies or permanent health plans	
	Income from family members ( <i>state from whom</i> )	
	Other income	
j	<b>TOTAL INCOME</b> ( <i>including benefits in kind</i> )	

<b>8 Employment and Housing Costs</b> <i>Please complete these details for a full 12 months based on your current expenditure. Enter all amounts in whole numbers (British £) or put 0 if relevant. Supporting documentation is required (see section 17)</i>			
		Parent #1 ( <i>e.g. Father</i> )	Parent #2 ( <i>e.g. Mother</i> )
a	Tax payable on all income declared at section 7		
b	National Insurance contributions		
c	Pension contributions		
d	Total repayments on mortgage shown at 5(a)		
e	Endowment payments		
f	Annual landlord rent payable on residence		
g	Life assurance premiums		
h	Private healthcare premiums		
Any other regular loan/interest repayments:			
i	Bank loans or overdrafts		
	Credit cards and store cards		
	Student Loans		
	Loans from family members		
	Other loans		
j	<b>TOTAL EMPLOYMENT &amp; HOUSING COSTS</b> ( <i>excluding regular household expenditure</i> )		

## 9 Household Expenditure

*This information should be completed for your household. Please complete these details for a full 12 months based on your current expenditure. You may find it easier to complete this information for a typical month and then to multiply the costs by 12. Enter all amounts in whole numbers (British £) or put 0 if appropriate.*

Monthly costs

Annual costs

Property Expenses			
a	Buildings & contents insurance		
	Council Tax		
	Water Rates		
	Combined utilities (oil, gas, electricity)		
	Other property expenses (e.g. service charges)		
General Household Expenses			
b	Food & groceries		
	Home telephone & internet		
	Repairs & maintenance		
	Other insurances (e.g. pet insurance)		
	TV Licence		
	Sky TV & other entertainment		
	Laundry or dry cleaning		
	Other household expenses		
Motoring Expenses			
c	Petrol & oil		
	Road tax		
	Car insurance		
	Car servicing		



Personal Expenses			
d	Clothing & footwear		
	Mobile phones <i>(including children)</i>		
	Gifts to charities		
	Travelling expenses <i>(not motoring)</i>		
	Other personal expenses <i>(e.g. eating out, gifts, hairdressing)</i>		
Healthcare expenses			
e	Dentist's fees		
	Doctor's fees & prescriptions		
	Optician's fees		
Children's expenses			
f	Childcare expenses <i>(au pair, childminder, after school clubs)</i>		
	Tutors		
	Clubs		
Other expenditure <i>(not included elsewhere)</i>			
g	Other costs <i>(please specify)</i>		
h	<b>TOTAL HOUSEHOLD EXPENDITURE</b>		

10 Net Income			
<i>Please calculate your total income minus your outgoings as listed in Sections 7,8 and 9.</i>			
		Parent #1 <i>(e.g. Father)</i>	Parent #2 <i>(e.g. Mother)</i>
a	TOTAL Income <i>(shown at section 7)</i>		
b	TOTAL Employment, Housing and Household Costs <i>(shown at sections 8 and 9)</i>		
c	<b>TOTAL NET INCOME</b> <i>(before school fees)</i>		
d If Net Income is very low or negative, please give details below of how you manage to cover your expenses on an on-going basis <i>(e.g. if you receive financial support from anyone)</i> .			

11 Pension Arrangements <i>Please tell us about your pension arrangements.</i>		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
a	Are you currently contributing, or have you previously contributed to a pension scheme?		
b	If so, is the scheme a defined contribution or a defined benefit scheme?		
c	How much does your employer (if relevant) contribute to your pension arrangements (in % or value terms)?		
d	If you are not in a workplace pension scheme do you have other arrangements in place?		
e	What do you estimate the current value of your pension pot(s) to be?		

12 Anticipated Improvement in Circumstances <i>Please indicate below if you expect promotion or any other significant improvement in your circumstances in the foreseeable future</i>	

13 Parental contribution to School Fees <i>The School uses limited, charitable funds to make bursary awards. Please estimate how much you can afford to pay in total each year towards Sherborne Girls school fees and extras.</i>	
f	

14 All Dependent Children <i>Please include details about the candidate and any other children including those in further education. If there are more than 4 children please give details on a separate sheet.</i>		Candidate	2	3	4
a	First name				
b	Gender				
c	Date of Birth (dd/mm/yyyy)				
d	Name of Current School, College or University				
e	Please state whether fee-paying or state				
f	Please state whether day-pupil or boarding				
g	Annual school or other educational fees (excluding extras)				
h	School extras				

Amount of fees shown in (g) covered by:					
i	Scholarships, Bursaries or other allowances given by school				
	Services/Diplomatic/Company Education Allowances (gross) <i>(state whether sum has been included in gross salary in Section 7 (a))</i>				
	Annual sum arising from Educational Insurance Policies				
	Assistance from any other sources, <i>(e.g. grandparents, step-parents, godparents, trusts, charities, etc)</i>				
	Please specify source				
j	Annual income of child <i>(if any)</i>				

15 Other Dependants	
<i>Please give details of any other dependants and how much you contribute towards their care or upkeep</i>	

16 Additional Information	
a	<p><b>Holiday Profile:</b> Please outline your family's foreign and UK holiday profile including costs over the last two years and any plans you have in place for holidays in the next 12 months.</p>
b	<p><b>Family support:</b> Are grandparents or other extended family members in a position to assist with fees?</p>

17 Privacy Notice	
<p>The information that you provide on this form will only be used for the purpose for which it has been given (i.e. for the purpose of acquiring necessary information for the administrative processing of a girl's bursary application) and may be shared with our third party consultants for this purpose. This administrative processing may include carrying out a credit check to better inform the School's understanding of the financial circumstances of the parents. It will not be used for additional purposes without your consent. All personal data is collected and processed in compliance with the principals of the General Data Protection Regulation (GDPR) and you have certain rights in respect of your information which can be seen in the Parent Privacy Notice on the school website.</p>	

<b>18 Supporting Documentation</b> <i>Please enclose copies of documentary evidence in support of the figures disclosed above. Please tick those you are enclosing. Applications are strengthened if full documentation is provided, and weakened if it is not.</i>			
In respect of income and expenditure:		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
a	Payslips (latest 3)		
b	P60 (latest) plus March payslip or confirmation of Schedule D self-employment income from an independent accountant		
c	P45 if you left employment in the last year		
d	HMRC tax calculation (last 2 years for self-assessment)		
e	Business accounts, including detailed profit & loss account and balance sheet (last 2 years) <i>If majority shareholder director or owner</i>		
f	Bank and credit card statements (last 3 months)		
g	Confirmation letter/s in respect of all social security benefits		
h	Court order/ Separation / Divorce Agreement <i>Where these cover arrangements for the payment of school fees and child maintenance</i>		
In respect of assets and borrowings:		Parent #1 (e.g. Father)	Parent #2 (e.g. Mother)
i	Mortgage statement/s		
k	Property valuation/s of all properties in the UK and abroad		
k	Investment portfolio valuation report		
l	Home contents insurance policy		
m	Any additional information supplied		

<b>19 Permissions</b>	
a	The school, or its representative, may wish to visit you at your home address to discuss your application for a bursary. Should we do so, you will be contacted to arrange a time that is as convenient for you as possible. Please indicate your agreement to this.  Yes, I agree to a home visit (please tick)
b	The school, or its representative may wish to carry out a credit check to better inform the School's understanding of the financial circumstances of the parents. Please indicate your agreement to this.  Yes, I agree to the School carrying out a credit check (please tick)
c	If your daughter is eligible to be considered for a Sherborne Old Girls Bursary, details of both the parents and the candidate will be shared with the Trustees of the Sherborne Old Girls Bursary Fund.  Yes, I agree to share our information with the Trustees of the Sherborne Old Girls Bursary Fund (please tick)

<b>20 Declaration</b>
In submitting this bursary application:

- a We/I recognise that the School does not have sufficient bursary funds to provide school fee assistance to all those who apply and it is, therefore, possible that the School may not be in a position to support our application and will not make an offer of a bursary.
- b We/I accept that the School reserves the right to withdraw the offer of a conditional place in respect of our daughter in any of the following circumstances:
  - (i) if, after reviewing our application, the School does not make an offer of a bursary and considers that we are not in a position to afford the fees; or
  - (ii) if the School reasonably considers that we have fraudulently, knowingly or recklessly provided incomplete or false information in connection with our bursary application; or
  - (iii) if, in the School’s opinion, we can afford to pay the fees but have been opportunistic in applying for a bursary award. The School takes a sceptical view of such applications given the number of parents in genuine need.
- c We/I confirm that we have made a complete and accurate declaration of our current income and expenditure and assets and liabilities in the Bursary Application Form.
- d We/I understand that if we are offered a bursary for our daughter and accept that the following terms and conditions will apply as between us and the School:
  - (i) the School Account for our daughter will be credited termly with the amount of the bursary for so long as the award remains in place;
  - (ii) any bursary award is subject to annual review and we must complete an annual declaration of our financial circumstances on the form sent to us by the School and supply all relevant supporting evidence by the return date indicated;
  - (iii) We/I must report immediately any significant change in the financial position declared on this form;
  - (iv) the bursary award may be withdrawn or reduced if:
    - we/I act in breach of the School’s Parent Contract as may be amended from time to time; or
    - we/I fail to return the annual declaration of our financial circumstances by the return date indicated; or
    - we/I fail to produce any additional information required by the School to evidence our financial circumstances; or
    - in the opinion of the Headmistress, our daughter’s attendance, progress or behaviour no longer merits the continuation of the award; or
    - we/I fail to pay the School under the terms of the Parent Contract; or we/I are more than 28 days in arrears in respect of any amount due and owing to the School
    - there is a material improvement in our/my financial circumstances such that the school determines we are able to contribute towards school fees; or
    - we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of a bursary, in which case the value of the bursary previously credited against our daughter’s fee account will become repayable to the school forthwith.

<b>Signatures:</b>	
<i>Each person with parental responsibility for the child is required to sign this form and the school is entitled to treat any information received from any person who has signed this form as having been on behalf of both or all such persons</i>	
<b>Parent #1 (e.g. Father)</b>	<b>Parent #2 (e.g. Mother)</b>
Date:	Date:

Appendix 1 - Other Property, Land or Buildings

For each property that you own complete the following information:

Full address of property <i>(including postcode)</i>	Owned by Father (F), Mother (M) or Joint (J)	Purchase date <i>(dd/mm/yyyy)</i>	Current value £	Current mortgage £	Interest or repayment mortgage?	Purchase price £	Rental income £	Rental profit £
TOTAL VALUES								

To agree with application form:

Section 4c	Section 5b
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Section 7e
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**Name of Candidate:**