



BURY

GRAMMAR SCHOOL

In association with
BURSARY ADMINISTRATION LIMITED

YEAR 12 BURSARY APPLICATION FORM (For September 2023)

Confidential Statement of Financial Circumstances

Please read the Guidance Notes at the end of this document before
completing this form

The completed form and supporting documentation should be
returned no later than 31st March 2023

Child's Name:

Assessing your application – Data Protection considerations

The School reserves the right to make all decisions regarding your application for a Bursary, but may employ the services of Bursary Administration Limited (BAL) to prepare the information, which is used to make the decision.

This means that, for the purposes of your application:

- The School is the Controller of your information
- BAL is the Processor of your information
- BAL is registered with the Information Commissioner's Office and has satisfied the School as to its arrangements regarding the security of any information and documents you may provide as part of your application

Please note that no application will be considered unless the process as detailed below is followed. **IN MAKING THIS APPLICATION AND COMPLETING THIS FORM, YOU WILL HAVE CONSENTED TO THE PROCESSING OF FINANCIAL AND PERSONAL DATA RELATING TO THE APPLICANTS, PERSONAL DATA RELATING TO THE CHILD, AND SENSITIVE PERSONAL DATA RELATING TO THE APPLICANTS AND THE CHILD. RELEVANT INFORMATION MAY BE OBTAINED FROM THIRD PARTIES. YOU ALSO CONSENT TO THE FOLLOWING PROCEDURE:**

1. You will complete this Application Form and send directly to the School. Supporting paperwork as required must be included.
2. The Application Form and the supporting paperwork may be scanned and forwarded by the School securely to BAL using Microsoft SharePoint so that BAL may prepare the information in the format required by the School.
3. The School or BAL will contact you to arrange for a home visit if this has been required by the School, or to make enquiries, which will ensure that any paper financial review is as correct as it can possibly be.
4. BAL will send its report on your application securely to the School through SharePoint and will then withdraw from the process unless the School has any further enquiries it wishes BAL to make.
5. BAL will return any original documents securely to the School, shred any scanned/photocopied evidence documents securely using an authorized service and scan and store securely on SharePoint its notes regarding your application; these notes will then be shredded securely using an authorized service. This process is undertaken once per year, and any papers (not your original supporting documents) will be held securely until then.
6. Your electronic records will be kept securely on SharePoint by BAL, and will be deleted four years after they are no longer required.

Please be assured that this process is undertaken for the purposes of considering your application for a Bursary only, and your information will not be passed to any third party or used in any other way whatsoever.

BAL can arrange to share reports between Schools if you are applying to more than one school for a bursary, but this will not be done without your written permission (email will suffice), and the permission of the School on whose behalf BAL first visited.

You are entitled to request that your information be deleted permanently at any time. It should be noted that the report produced by Bursary Administration is the property of the School and the Information Commissioner's Office regards your report as confidential and exempt from the provision of Subject Access Requests.

I/we have read the above and consent to my/ours and the child's/children's information being processed in the manner described above:

Date: _____

1. CHILD

a) Child's full name

b) Date of birth

2. PARENTS

(see note 2)

	Father/Stepfather	Mother/Stepmother
a) Title		
b) Full name		
c) Home Address		
d) Home Tel		
e) Mobile Tel		
f) E-mail		
g) Employment status	Employed	Employed
	Self Employed	Self Employed
	Unemployed	Unemployed
	Retired	Retired
h) Employer name		
i) Occupation		
j) Are you a Co-Director?	Yes / No	Yes / No
k) Are you a Shareholder in the business?	Yes / No	Yes / No

3. INCOME

(see note 3)

Please use annual amounts	Father £	Mother £	Combined £
a) Gross salary			
b) Business profits or self-employed earnings			
c) Gross pensions			
d) Gross investment income			
e) Benefits received:			
o Child Benefit			
o Tax Credits			
o Universal Credits			
o Carer's Allowance			
o Disability / PIP			
o Housing / Council Tax			
o Other Benefits			
f) Maintenance received			
g) Rental property income			
h) Family support			
i) Student finance			
j) Benefits in kind received free			
k) Court order/separation agreement – school fees receivable			
l) Other income			

4. OUTGOINGS

(see note 4)

Please use annual amounts	Father £	Mother £	Combined £
a) Tax on income			
b) National insurance contributions			
c) Pension contributions			
d) Mortgage payments on main residence			
e) Rent payments on main residence			
f) <u>Household expenditure:</u>			
o House insurance			
o Ground rent / service charges			
o Council tax			
o Light / Heat / Power			
o Water			
o Landline / Broadband packages			
o TV licence			
o Other expenses			
g) <u>Rental property expenditure:</u>			
o Mortgage			
o Agent's Fees			
o Landlord's insurance			
o Maintenance contracts			
o Ground rent			
o Service charges			
o Certification			
o Council tax			
o Utility bills			
o Repairs / Maintenance			
o Other expenses			
h) <u>Leisure expenses:</u>			
o Sky / Netflix/Prime etc			
o Mobile phones			
o Pet care			
i) Medical costs			
j) Food including school lunches			
k) Clothing			
l) <u>Debt servicing:</u>			
o Loan repayments			
o Credit card repayments			
o Debt management repayments			
m) Life insurance and/or private health care			
n) <u>Activities:</u>			

○ Children's activities			
○ Parent's activities			
o) <u>Transport:</u>			
○ Public transport costs			
○ Car 1:			
○ Finance			
○ Fuel			
○ Tax / Insurance/ Maintenance			
○ Car 2:			
○ Finance			
○ Fuel			
○ Tax / Insurance/ Maintenance			
○ Breakdown cover			
○ Parking costs			
p) University support			
q) Nursery fees			
r) Childcare			
s) Tutors (Academic / Music)			
t) Professional fees			

Other expenses:

Planned capital expenditure in the next 12 months (eg house, vehicle, white goods):

5. ASSETS

(see note 5)

Approximate market value	Father £	Mother £	Combined £
a) Family home			
b) Other UK property			
c) Foreign property			
d) Current account			
e) Deposit account			
f) Shares/equities			
g) ISAs			
h) Premium bonds			
i) Fixed term bonds			
j) Other investments			
k) Pension (if over 55)			
l) Insurance settlements due			
m) Declared insurance items			
n) Value of Business			
o) Redundancy settlements due			
p) Inheritance received			
q) Gambling / Lottery winnings			

Vehicle details:

	Make	Year of registration	Value
Car 1			
Car 2			

6. LIABILITIES (monies owed)

(see note 6)

	Father £	Mother £	Combined £
a) Mortgage (Family home)			
b) Secured loans			
c) Other UK mortgages			
d) Foreign mortgages			
e) Commercial loans			
f) Family loans			
g) Finance leases			
h) Credit cards			
i) Arrears			
j) School fee arrears			
k) Debt management			

7. DEPENDANT CHILDREN (see note 7)

	Applicant	Child 2	Child 3	Child 4
a) Child's name				
b) DOB				
c) Current school				
d) Boarding or day				
e) Annual fees				
f) Compulsory extras				
g) Uniforms				
h) Fees covered by:				
o School scholarships / bursaries / allowances				
o Family assistance				
o Other assistance				
o Child's income				

8. Other dependants (see note 5):

STATEMENT OF AIM

Please indicate how much you feel you can contribute towards school fees each term:

DOCUMENTS TO BE SUPPLIED

Please supply good copies of the following documents:

	Tick to confirm supplied
• 3 recent payslips	
• P60 for 2021/2022 or if available 2022/23	
• 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' most recent bank statements for all accounts	
• Proof of value of savings and investments (may include internet valuation)	
• Latest pension and endowment valuation	
• Benefit/Tax Credit/Universal Credit 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	

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:

- a) Our/my child's fees account with the school will be credited termly with the amount of the bursary
- b) We/I understand that any bursary 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

The bursary 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 as stated in the parent contract and bursary regulations
- ii) there is, in the view of the Head either unsatisfactory work or conduct
- iii) the school's resources are insufficient to maintain the level of the award
- iv) we/I have knowingly and/or recklessly provided false information
- v) we/I have failed to return the annual declaration of our/my financial circumstances by return date indicated

All bursary awards are subject to the provision of truthful and accurate information. Deliberate provision of false and/or misleading information is a criminal offence and will lead to the matter being referred to the police. The provision of false and/or misleading information or the failure to provide all material information will lead to the child or children in question being disqualified from awards and the full fees paid from the date the bursary was awarded being upon demand immediately repayable together with interest equivalent to the High Court Judgment debt rate from the date such monies were advanced under the bursary to repayment in full being made.

Consent

By submitting your data via this form including any accompanying documentation, you consent to the collection, processing, use, storage and transfer of your personal data in accordance with the School's Bursary Policy.

Withdrawal of Consent and Rectification Rights

You may at any time withdraw your consent to the processing of your personal data and information. If you withdraw your consent, we will not transmit your personal data except as permitted by applicable law. You have the right to access, rectify, erase, block and oppose any processing of your personal data held by the School.

Should you wish to withdraw your consent to the processing of your data please email fees@burygrammar.com with the subject title 'Withdraw Consent'. If you withdraw consent, the School will be unable to take your bursary application forward and you will not be awarded a bursary.

If you believe our processing of your data violates applicable law, you may have the right to complain to the relevant data protection authorities.

Signatures:

Father/Stepfather _____ Date: _____

Mother/Stepmother _____ Date: _____

A bursary will not be awarded unless the bursary application is completed and signed by all parties who will sign the parent contract.

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

Divorced/separated/widowed/Other (state reason) _____

If this form is completed using a computer, you may be asked to provide a handwritten signature at a later date.

Please return this form and all documents to:

Bury Grammar School, Finance Office, Farraday House, Bridge Road, Bury, BL9 0HG

Please ensure the completed form and all documentation are returned by 31st March 2023

For all queries please email fees@burygrammar.com

GUIDANCE NOTES

Please read the notes carefully before completing the Application Form. Please also read the School's Data Protection Policy and The Bursary Policy. If you need further help, please contact Bury Grammar Schools Finance Office.

The numbers below refer to the same numbers on the application form. If you pay tax in any way, please include the appropriate reference number. If any of your assets are held abroad, please convert the value to pounds sterling.

2. PARENTS/APPLICANTS

Anyone with care and control of a child can apply for assistance. This person could be:

- the natural father and mother of a child where they live together
- the natural father or mother of a child and their new partner
- the child's appointed Guardian (appointed by a Court)
- the person with whom a child resides and has care and control of the child as a result of a court order or other legal agreement
- the person with whom a child resides and has care and control of the child as a result of an informal agreement

Please note if the natural parents are separated and/or divorced both will be required to provide financial information and sign the Application Form

3. INCOME

- a) The estimated gross annual amount of income FROM ANY SOURCE for the 2022/23 financial year
- b) Profits from a business or profession – the gross amount agreed for taxation purposes. Deductions should only be made in respect of capital allowances, losses and stock relief. Please include the latest set of accounts.
- d) All investment income, including building society interest, should be shown gross
- f) All income from maintenance payments, separation allowances and Child Support maintenance must be declared. Arrears in any payments will not be taken in to account.
- g) Gross income from letting or sub-letting of property
- k) Where a parent is required by any Court or legal order to pay part of the school fees then only the part of the fee which is not covered by the order will be used to calculate any bursary awarded. Arrears in any payments of part schools' fees will not be taken in to account.
- j) Include free benefits in kind that are agreed by the Inland Revenue as not being subject to tax

4. OUTGOINGS

- a) Enter income tax and tax on unearned income TOGETHER
- c) Enter payments to pension schemes
- d) Enter capital as well as interest payment on a mortgage for the main residence

5. PARENTS'/APPLICANTS' CAPITAL ASSETS

The following will be taken in to account:

- a) The current market value of the main residence (please estimate)
- b) The current market value of any other properties (please estimate)
- n) If you run your own business or are partners in a business, then you should show the total net worth of the business. Shares in a company not listed on the Stock Exchange should be valued at your share of the net value of the company.

6. PARENTS'/APPLICANTS CAPITAL LIABILITIES

Please detail all other monies owed, together with the lender's name on a separate sheet if necessary

7. DEPENDENT CHILDREN

Use column 1 for the child for whom you are applying and columns 2 to 4 for any other dependents.

- e) Please refer to the current academic year
- h)
 - (iii) Please state any other educational allowances received
 - (iv) If you have been able to claim under any policy, please declare the amount received under the policy for the current academic year
 - (v) If the child is in receipt of financial assistance from any other family members or income from a Trust Deed please declare the annual amount available
 - (vi) Please enter the gross amount of any interest / share dividends received by the child

8. OTHER DEPENDENTS

Please provide details of any other family members who are financially dependent upon you.

9. ANY OTHER RELEVANT INFORMATION

Please enter, on the sheet provided if necessary, any details which may affect the assessment of the bursary, for example any anticipated change in income or outgoings for the coming year.

**YOU MAY WISH TO KEEP A COPY OF YOUR COMPLETED
FORM FOR YOUR OWN RECORDS**