

## APPLICATION FOR A TSF BURSARY FOR PUPILS WISHING TO JOIN THOMAS'S

### STATEMENT OF FAMILY AND FINANCIAL CIRCUMSTANCES

The TSF Bursary Committee attaches great importance to the Covering Letter. Please give as full an explanation as possible of the family and financial circumstances as well as of your intentions for your child's future education. Tell us about:

- Your current family circumstances, family members and home situation, leisure activities, interests and more
- Both parents'\* work situation (job title, organisation, position held for how long, advantages/disadvantages, future opportunities, former jobs)
- Your current financial situation and future financial plans
- Your child's current school experience
- Plans for your child's future education after Thomas's
- Any additional information that you feel might be relevant

**If you have any queries or would like assistance completing this application, please contact Mrs Lucy Horstead on 020 7978 0611.**

**Please return the completed application with the photocopied supporting documents to:**

**Mrs Lucy Horstead  
TSF Administrator  
Holly House, Clandon Road  
West Clandon, Surrey  
GU4 7TL**

**CONFIDENTIAL WHEN COMPLETED**

## **NOTES FOR PARENTS ON COMPLETING A TSF BURSARY APPLICATION**

- TSF bursaries are subject to the TERMS AND CONDITIONS outlined at the back. Please read these carefully before starting to complete your form.
- Please complete the form by downloading it from the website. Type your answers and print it. If this is not possible please print the form and fill it in using black ink and BLOCK CAPITALS.
- Please include all documentation as requested in the DOCUMENT CHECKLIST.
- Parents\* are reminded that if false information is knowingly or thoughtlessly provided, TSF may withdraw the Bursary Award and may seek to recover any benefits received.
- Where possible, both Parents/Guardians should complete this application form jointly.
- All information must be completed for both parents\* and both must sign the declaration.
- Where the parents are separated/divorced, we expect to receive two application forms, one from each parent.
- If you are applying as Guardian/Fee Payer, we normally expect you to apply jointly with another Guardian (if there is more than one Guardian).
- If you have any additional information which you feel would help your application, please put it on a separate sheet or in the covering letter and include it with the form.







## PERSONAL DETAILS

### CHILD

Full name \_\_\_\_\_  
*(please underline name generally used)*

Date of birth \_\_\_\_\_

Gender *(boy/girl)* \_\_\_\_\_

Current school and year \_\_\_\_\_

### PARENTS / GUARDIANS

#### Parent 1\*

#### Parent 2\*

Name \_\_\_\_\_

Title *(Mr, Mrs, Miss, Ms, etc)* \_\_\_\_\_

Person with whom the child lives *(please tick one or both)* \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Daytime telephone number \_\_\_\_\_

Mobile telephone number \_\_\_\_\_

E-mail address \_\_\_\_\_

Occupation \_\_\_\_\_

Are you employed/ self-employed/ unemployed/ retired/ homemaker? \_\_\_\_\_

Name of employer *(if applicable)* \_\_\_\_\_

Are you a company director? YES / NO YES / NO

If yes, please provide details of share holdings % %

Name of company *(if applicable)* \_\_\_\_\_

\* or guardian or other fee payer

**DEPENDENT CHILDREN**

Please list ALL the children whom you support financially including the child you are applying for.

	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
Name	_____	_____	_____	_____
Date of birth	_____	_____	_____	_____
Age	_____	_____	_____	_____
Gender ( <i>boy / girl</i> )	_____	_____	_____	_____
Name of current school / college	_____	_____	_____	_____
Type of school ( <i>day / boarding / state / private</i> )	_____	_____	_____	_____
	<b>£</b>	<b>£</b>	<b>£</b>	<b>£</b>
Annual school fees / other educational fees ( <i>if applicable</i> )	_____	_____	_____	_____
Clubs / other activities ( <i>e.g. sport, music, drama</i> )	_____	_____	_____	_____
Amount of fees shown above covered by bursaries/ scholarships/ other allowances given by the school ( <i>if applicable</i> )	_____	_____	_____	_____
Assistance from other sources ( <i>if applicable, e.g. grandparents, trusts</i> )	_____	_____	_____	_____
Child's annual income ( <i>e.g. from interest on savings, trusts</i> )	_____	_____	_____	_____
Any other childcare costs ( <i>e.g. childminder</i> )	_____	_____	_____	_____

ANY OTHER DEPENDENTS WHOM YOU SUPPORT FINANCIALLY

\_\_\_\_\_

\* or guardian or other fee payer

## FINANCIAL DETAILS

These sections must be completed in full. **Enter 'NIL' if applicable but do not leave any blanks.**

Income, expenditure and capital valuations should be for **the date the form is signed or the most recent tax year** where appropriate.

If figures entered differ significantly from previous years or may be different in the future please tell us why on a separate piece of paper or in your covering letter.

Please provide photocopies of documents as detailed on the enclosed **DOCUMENTATION CHECKLIST**.

We appreciate that some of the answers may be 'nil' and that you will have to do a fair amount of work to supply the information to us. Please understand our need to have a full and accurate disclosure.

### 1. ANNUAL INCOME (UK AND OVERSEAS)

*(all income is to be stated gross)*

a) Regular Income	Parent 1 *	Parent 2 *
	£	£
Salary / wages <i>(including bonuses)</i>	_____	_____
Income from other jobs	_____	_____
Benefits in kind provided free by employer <i>(e.g. car, housing, health insurance etc., please be specific)</i>	_____	_____
Pension or retirement pay	_____	_____
Profit from business or profession <i>(last three years)</i>	_____	_____
Building Society, Bank and other interests	_____	_____
Rental income from properties <i>(UK and overseas)</i>	_____	_____
Any other income from UK or overseas	_____	_____

\* or guardian or other fee payer



Income from ISAs, capital gains,  
endowment plans, life  
assurances, investment bonds  
(last three years)

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Maintenance & alimony  
payments received

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**TOTAL REGULAR INCOME**

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**b) Government Assistance  
(Benefits)**

- Universal credit

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- Child benefit

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- Council tax reduction

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**Other Benefits (e.g.)**

- Child tax credit

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- Working tax credit

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- Housing benefit

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- Income support

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- Employment & Support  
Allowance

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- Jobseeker's Allowance

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- Disability Living  
Allowance

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- Other benefits (please  
specify)

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**TOTAL GOVERNMENT  
BENEFITS**

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\* or guardian or other fee payer

**c) Lump Sum Payments**

Redundancy payments	_____	_____
Disposal (sale) of assets in the last three years ( <i>e.g. properties, shareholdings</i> )	_____	_____
Inheritances received in the last three years ( <i>please be specific</i> )	_____	_____
Donations or lump sum payments	_____	_____
<b>TOTAL LUMP SUM PAYMENTS</b>	_____	_____
<b>TOTAL ANNUAL INCOME (a + b + c)</b>	_____	_____

**2. ALL UK & OVERSEAS ASSETS** (*at current market value*)

	<b>Parent 1 *</b> (to the nearest £1000)	<b>Parent 2 *</b> (to the nearest £1000)
House / property ( <i>principal residence</i> )	_____	_____
Other houses / properties ( <i>if applicable; please give details including addresses</i> )	_____	_____
Car /s	_____	_____
Valuable possessions ( <i>insurance value of home contents and personal valuable items</i> )	_____	_____
Building society deposits / savings accounts	_____	_____
Cash in bank	_____	_____

\* or guardian or other fee payer

Investments/ shares/ bonds/  
ISAs/ trusts (*give specific  
details using a separate piece  
of paper if necessary*)

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Any other assets  
(*value of business, assets  
abroad etc*)

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Pension assets (*please list **ALL  
pensions**, the value and date of  
maturity*)

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**TOTAL ASSETS**

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**3. TAXATION**

**Parent 1 \***  
£

**Parent 2 \***  
£

Tax on income

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Tax on capital gains

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National Insurance

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**TOTAL TAX / NATIONAL  
INSURANCE**

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**4. ANNUAL EXPENDITURE**

**Parent 1 \***  
£

**Parent 2 \***  
£

Mortgage repayments

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- Capital

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- Interest

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Loans and credit card  
repayments

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Rent

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Council Tax

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\* or guardian or other fee payer

Electricity	_____	_____
Gas	_____	_____
Water	_____	_____
Telephones / Broadband / TV	_____	_____
Car ( <i>maintenance, petrol, parking</i> )	_____	_____
Regular travel expenses ( <i>excluding car</i> )	_____	_____
Other regular living expenses ( <i>e.g. food, clothing etc.</i> )	_____	_____
Maintenance and alimony payments	_____	_____
Pension contributions	_____	_____
School fees paid, including extras ( <i>after subtracting any assistance or scholarships</i> )	_____	_____
Insurance		
- House / home	_____	_____
- Car	_____	_____
- Life	_____	_____
- Other ( <i>e.g. medical, travel</i> )	_____	_____
Any other significant expenditure	_____	_____
<b>TOTAL ANNUAL EXPENDITURE</b>	_____	_____

\* or guardian or other fee payer

**5. DEBTS**

	<b>Parent 1 *</b>	<b>Parent 2 *</b>
	<b>£</b>	<b>£</b>
Mortgage	_____	_____
2 <sup>nd</sup> Mortgage <i>(if applicable)</i>	_____	_____
Bank overdraft	_____	_____
2 <sup>nd</sup> Bank account overdraft <i>(if applicable)</i>	_____	_____
3 <sup>rd</sup> Bank account overdraft <i>(if applicable)</i>	_____	_____
Building Society loan	_____	_____
2 <sup>nd</sup> Building Society loan <i>(if applicable)</i>	_____	_____
3 <sup>rd</sup> Building Society loan <i>(if applicable)</i>	_____	_____
Credit card	_____	_____
2 <sup>nd</sup> Credit card <i>(if applicable)</i>	_____	_____
3 <sup>rd</sup> Credit card <i>(if applicable)</i>	_____	_____
4 <sup>th</sup> Credit card <i>(if applicable)</i>	_____	_____
5 <sup>th</sup> Credit card <i>(if applicable)</i>	_____	_____
Other loans <i>(e.g. car)</i>	_____	_____
Any other borrowing <i>(e.g. from family, friends, employer)</i>	_____	_____
<b>TOTAL DEBTS</b>	_____	_____

\* or guardian or other fee payer

## DOCUMENTATION CHECKLIST

- Please ensure your application is complete.
- Please provide copies of the documentation that supports your completed application form.
- Please tick the appropriate boxes below or write n/a if not applicable.
- If you have additional documentation that you think is relevant to your application, please include it.

	<b>Parent 1 *</b>	<b>Parent 2 *</b>
<b>INCOME</b>		
<i>(please include all UK and any overseas income)</i>		
Latest payslip	<input type="checkbox"/>	<input type="checkbox"/>
March payslip	<input type="checkbox"/>	<input type="checkbox"/>
Pension pay advice	<input type="checkbox"/>	<input type="checkbox"/>
For shareholders of private limited companies, a copy of the latest available accounts	<input type="checkbox"/>	<input type="checkbox"/>
Dividend certificates	<input type="checkbox"/>	<input type="checkbox"/>
Statements of interest received or building society passbook	<input type="checkbox"/>	<input type="checkbox"/>
Statement of untaxed interests	<input type="checkbox"/>	<input type="checkbox"/>
Statement of rental income other than those included in your tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of income from ISA, trusts, endowment plans, life assurances, investment bonds, capital gains <i>(if not included in your self-assessment return)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of maintenance & alimony payments received	<input type="checkbox"/>	<input type="checkbox"/>
Statements of government assistance (Benefits) received, including Universal Benefit or other benefits	<input type="checkbox"/>	<input type="checkbox"/>
Child benefit	<input type="checkbox"/>	<input type="checkbox"/>

\* or guardian or other fee payer

Council Tax reduction	<input type="checkbox"/>	<input type="checkbox"/>
Redundancy documentation	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of sales of assets	<input type="checkbox"/>	<input type="checkbox"/>
Inheritance documentation	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation relating to INCOME ( <i>specify</i> )	<input type="checkbox"/>	<input type="checkbox"/>

**Parent 1 \***

**Parent 2 \***

**ASSETS**

*(please include all UK and any overseas assets)*

Recent property valuation ( <i>if made personally please state how</i> )	<input type="checkbox"/>	<input type="checkbox"/>
Valuation of further properties ( <i>if made personally please state how</i> )	<input type="checkbox"/>	<input type="checkbox"/>
Insurance documents		
- Car	<input type="checkbox"/>	<input type="checkbox"/>
- Other valuable possessions	<input type="checkbox"/>	<input type="checkbox"/>
Last three months' bank statements <i>(for ALL bank accounts including business accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Building Society passbook or statements <i>(for ALL Building Society Accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation in relation to ASSETS <i>(please specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>

**Parent 1 \***

**Parent 2 \***

**TAXATION**

Latest available HMRC self-assessment return and HMRC tax calculation	<input type="checkbox"/>	<input type="checkbox"/>
P60 (end of financial year)	<input type="checkbox"/>	<input type="checkbox"/>

\* or guardian or other fee payer

P45 (end of employment)	<input type="checkbox"/>	<input type="checkbox"/>
P11D (benefits in kind, e.g. company car)	<input type="checkbox"/>	<input type="checkbox"/>
Notification of Tax coding	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation relating to TAXATION <i>(please specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>

**Parent 1 \***

**Parent 2 \***

**EXPENDITURE / LIVING EXPENSES**

Mortgage statements <i>(for ALL mortgages)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Credit card statements <i>(last three months for ALL credit cards)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Rent statement	<input type="checkbox"/>	<input type="checkbox"/>
Council Tax Bill	<input type="checkbox"/>	<input type="checkbox"/>
Last two utilities bills including:		
- Electricity	<input type="checkbox"/>	<input type="checkbox"/>
- Gas	<input type="checkbox"/>	<input type="checkbox"/>
- Water	<input type="checkbox"/>	<input type="checkbox"/>
- Telephone / Broadband / Television	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements <i>(last three months for ALL accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Building Society <i>(last three months for ALL accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of maintenance or alimony payments	<input type="checkbox"/>	<input type="checkbox"/>
Pension payments	<input type="checkbox"/>	<input type="checkbox"/>

\* or guardian or other fee payer



Insurance documents

- House
- Car
- Life
- Other (e.g. medical, travel)

Any other documentation relating to EXPENDITURE  
(please specify)

 

**Parent 1 \***

**Parent 2 \***

**DEBTS**

- Bank overdrafts (All accounts)
- Bank loans (All accounts)
- Building Society loans (All accounts)
- Credit cards (All credit cards)
- Company liabilities (All accounts)
- Any other loan agreements
- Any other documentation relating to DEBTS

\* or guardian or other fee payer

The Trustees of TSF expect applicants to have made serious endeavours to obtain support from family members or friends where appropriate. Which family members have you approached and have any contributions been offered?

Any other relevant information:

TSF Bursaries awarded are up to a maximum of 90% of the annual school fees. How much do you think you can personally contribute?

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## DECLARATION AND SIGNATURES

I/We declare that I/we have checked this form and to the best of my/our knowledge all information provided is a true and correct representation of the facts relevant to this application.

I/We undertake to renew this statement annually, when called upon to do so and in any case to report immediately to the Chair of Trustees of TSF any material change in the financial position detailed.

I/We understand that if false information is knowingly or thoughtlessly provided, TSF may withdraw the TSF bursary award and seek to recover any benefits received under the award.

I/we have read and understood the TSF bursary TERMS AND CONDITIONS.

I/We give explicit consent to the disclosure of the information I/we have supplied to the members of the TSF Bursary Committee, to the Trustees of TSF and to the Principals of Thomas's London Day Schools. I/We understand that the information will not be disclosed to other parties without my/our written consent in each case.

Date:	Signature:	Parent 1/ Guardian/ Other fee payer (please circle)
_____	_____	

Date:	Signature:	Parent 2 / Guardian/ Other fee payer (please circle)
_____	_____	



## TERMS AND CONDITIONS

### 1. Award of a TSF bursary

The award of any TSF bursary, its amount, its duration and any renewal of it are at the absolute discretion of the Trustees of Thomas's Schools Foundation (TSF).

### 2. Obligations of the Pupil

The recipient of a TSF bursary is expected to work hard, to contribute positively to life at Thomas's, to be a credit to the school and set a good example to other pupils. These matters will be monitored by the TSF Bursaries Committee through regular school reports.

### 3. Obligations of the Parents\*

Parents\* of a TSF bursary recipient must

- supply truthful and complete information and update this information annually
- notify Trustees immediately of any change in personal or financial circumstances
- support and encourage the pupil to fulfil his or her obligations
- uphold the aims and good name of Thomas's London Day Schools and TSF
- pay the share of fees not met by the award of a TSF bursary
- cover all extra expenses unless informed otherwise by TSF

### 4. Withdrawal of a TSF bursary

The award of a TSF bursary will be withdrawn by written notice to a parent\* if in the opinion of the Trustees acting in good faith

- the pupil or a parent\* has not complied with their respective obligations set out above,
- the financial circumstances of the parents\* have improved materially
- the amount payable by the parents\* remains unpaid 28 days after a written reminder has been sent out to the parents\*.

Withdrawal or reduction of a TSF bursary will take effect from the start of the following term.

### 5. Incorrect or incomplete Information – Repayment

Parents\* will be required upon written notice to repay immediately all or part of the TSF bursary benefits received if a parent\* has supplied information which in the opinion of the Trustees is incorrect or incomplete or if they have failed to supply additional information about any change in personal or financial circumstances that could affect the assessment or reassessment by the TSF Bursary Committee.

### 6. Confidentiality

The Trustees of TSF and the Bursary Committee will observe strict confidentiality concerning the circumstances of parents\* and any information received from parents\* or third parties in connection with any TSF bursary. Similarly, parents\* are required to keep their dealings with TSF confidential.

### 7. Secondary Education

The Head of the Thomas's school which the TSF bursary recipient attends and the TSF senior schools advisor can give advice and support at the appropriate time on applying for financial assistance at the pupil's next school.

\* or guardian or other fee payer