

Bursary / Financial Aid Application Form



Are you a new or existing application? NEW: EXISTING:

Please read the attached notes carefully and then complete the form in block capitals using black ink. **All** sections of the form **must** be completed. Please ensure that you complete section O to confirm submission of supporting documentation.

A. Student information

Surname	<input type="text"/>
Forename(s)	<input type="text"/>
Nationality	<input type="text"/>
Date of birth	<input type="text"/>
Year of entry	<input type="text"/>

Student's present address:

Father's address (if different):

Mother's address (if different):

	Father	Mother
Name	<input type="text"/>	<input type="text"/>
Work tel.	<input type="text"/>	<input type="text"/>
Mobile	<input type="text"/>	<input type="text"/>
Home tel	<input type="text"/>	<input type="text"/>
e-mail	<input type="text"/>	<input type="text"/>

Please indicate status of parents' relationship (married, divorced, separated, partners, deceased) below:

B. Schools attended by your child

Please give details of schools previously attended. Please indicate type of school and any fees paid detailing the percentage of any bursary assistance or scholarship received:

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C. Parent details

	Father	Mother
Occupation	<input type="text"/>	<input type="text"/>
Employment status <i>(please select)</i>	Employed <input type="checkbox"/> self-employed <input type="checkbox"/> unemployed <input type="checkbox"/> full time <input type="checkbox"/> part time <input type="checkbox"/> retired <input type="checkbox"/> student <input type="checkbox"/>	Employed <input type="checkbox"/> self-employed <input type="checkbox"/> unemployed <input type="checkbox"/> full time <input type="checkbox"/> part time <input type="checkbox"/> retired <input type="checkbox"/> student <input type="checkbox"/>
Date of birth	<input type="text"/>	<input type="text"/>
Name and address of employer or business	<input type="text"/>	<input type="text"/>
If the employer is a limited company, please state: - whether you are a director - per cent shareholding (if any)	<input type="text"/>	<input type="text"/>

If either parent is unemployed, please explain in the box below why this is the case and what steps are being taken to find employment:

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D. Court orders and separation agreements for school fees

Please state any amounts to be paid in respect of the school year 2021/2022

£

E. Insurance policies for school fees

Please state the name of the insurance company (if applicable)

£

Please state the amount payable for the school year 2021/2022

£

F. Dependent children

Please give details of income, if any, for all children, up the age of 18 or 21 if in full time education, wholly or mainly dependent on the parents. Include the child for whom the application is made

Full name

Gender (please select)

Male

Female

Date of birth

Name of school/
college/ university

School type
(please select)

Maintained Independent

Fees (if applicable)

£

Bursary award
(if applicable)

%

Assistance from other sources eg
relatives, educational allowances
from employer, trusts etc

£

Capital value of
trust for child

£

Full name

Gender (please select)

Male

Female

Date of birth

Name of school/
college/ university

School type
(please select)

Maintained Independent

Fees (if applicable)

£

Bursary award
(if applicable)

%

Assistance from other sources eg
relatives, educational allowances
from employer, trusts etc

£

Capital value of
trust for child

£

Full name

Gender (please select)

Male

Female

Date of birth

Name of school/
college/ university

School type
(please select)

Maintained Independent

Fees (if applicable)

£

Bursary award
(if applicable)

%

Assistance from other sources eg
relatives, educational allowances
from employer, trusts etc

£

Capital value of
trust for child

£

G. Parents' income

Please complete the table below giving gross income (i.e. before deduction of tax) from all sources, for the tax year 2020/21 (6 April 2020 - 5 April 2021). Enter actual amounts in whole pounds (not pence) or 'nil' as applicable. If actual amounts are not available it is acceptable to enter estimates. Please indicate where estimates have been used and explain in section N when the actual income details will be available. Documentary evidence must be provided for all income declared.

Earned income	FATHER	MOTHER	Tick if documentary evidence supplied ✓
Gross salary	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip <input type="checkbox"/>
Benefits in kind	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip <input type="checkbox"/>
Bonus(es) received in the year	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip <input type="checkbox"/>
Pension income	£ <input type="text"/>	£ <input type="text"/>	Payslip / tax return <input type="checkbox"/>
Social security benefits - child tax allowance, tax credits et al (enter details in section I)	£ <input type="text"/>	£ <input type="text"/>	HMRC / DWP letter <input type="checkbox"/>
Property income (enter details in section K)	£ <input type="text"/>	£ <input type="text"/>	Signed tenancy agreement <input type="checkbox"/>
Gross building society and bank interest received	£ <input type="text"/>	£ <input type="text"/>	Bank statement - 3 months <input type="checkbox"/>
Other investment income	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents <input type="checkbox"/>
Separation or maintenance allowance	£ <input type="text"/>	£ <input type="text"/>	Copy of court order or separation agreement <input type="checkbox"/>
Any other income, gratuities or lump sum payments not included above	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents <input type="checkbox"/>
Any other assistance received towards household expenditure (eg contributions from relatives)	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents <input type="checkbox"/>

Annual total 2020/21

£

£

H. Parents' income – current year assessment

To be completed only if your 2021/22 income is likely to be significantly different from 20/21.

If your total income is likely to be significantly lower or higher in the tax year 2021/2022 than the amounts shown in section G, please supply estimated income details for tax year 2021/2022. Please give reasons for expected change in income in section N.

	FATHER	MOTHER		Tick if documentary evidence supplied ✓
Earned income				
Gross salary	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip	<input type="checkbox"/>
Benefits in kind	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip	<input type="checkbox"/>
Bonus(es) received in the year	£ <input type="text"/>	£ <input type="text"/>	P60 / tax return / payslip	<input type="checkbox"/>
Pension income	£ <input type="text"/>	£ <input type="text"/>	Payslip / tax return	<input type="checkbox"/>
Social security benefits - child tax allowance, tax credits et al (enter details in section I)	£ <input type="text"/>	£ <input type="text"/>	HMRC / DWP letter	<input type="checkbox"/>
Property income (enter details in section K)	£ <input type="text"/>	£ <input type="text"/>	Signed tenancy agreement	<input type="checkbox"/>
Gross building society and bank interest received	£ <input type="text"/>	£ <input type="text"/>	Bank statement - 3 months	<input type="checkbox"/>
Other investment income	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents	<input type="checkbox"/>
Separation or maintenance allowance	£ <input type="text"/>	£ <input type="text"/>	Copy of court order or separation agreement	<input type="checkbox"/>
Any other income, gratuities or lump sum payments not included above	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents	<input type="checkbox"/>
Any other assistance received towards household expenditure (eg contributions from relatives)	£ <input type="text"/>	£ <input type="text"/>	Valid supporting documents	<input type="checkbox"/>

Estimated total 2021/22

£

£

I. Government social securities

Are you currently in receipt of the following benefits listed below? If so, please ensure that you **provide full documentary evidence** of all social securities received. Failure to do so will delay the assessment of your application. Evidence includes letters/ statements from HMRC and/or Department of Work and Pensions.

Next to the amounts please also specify whether benefits are paid to you weekly, monthly or annually

		<i>Tick if documentary evidence supplied ✓</i>
Child benefit	£ <input type="text"/>	<input type="checkbox"/>
Income support or income-based Jobseeker's Allowance	£ <input type="text"/>	<input type="checkbox"/>
Contribution-based Jobseeker's Allowance	£ <input type="text"/>	<input type="checkbox"/>
Working tax credit	£ <input type="text"/>	<input type="checkbox"/>
Child tax credit	£ <input type="text"/>	<input type="checkbox"/>
Widowed mother's allowance	£ <input type="text"/>	<input type="checkbox"/>
Carers' allowance	£ <input type="text"/>	<input type="checkbox"/>
Disability living allowance	£ <input type="text"/>	<input type="checkbox"/>
Incapacity benefit	£ <input type="text"/>	<input type="checkbox"/>
Housing benefit	£ <input type="text"/>	<input type="checkbox"/>
Council tax exemption	£ <input type="text"/>	<input type="checkbox"/>
Please list any other benefits below:		
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>
Annual total for all benefits	£ <input type="text"/>	

J. Parents' household expenditure

Please complete the table below giving total household expenditure from all sources, for the tax year 2020/22021 (6 April 2020- 5 April 2021). Enter actual amounts in whole pounds (not pence) or 'nil' as applicable.

	FATHER	MOTHER		Tick if documentary evidence supplied ✓
Tax payable on gross salary declared in section G	£	£	P60 / tax return / payslip	<input type="checkbox"/>
National insurance contributions	£	£	P60 / tax return / payslip	<input type="checkbox"/>
Pension contributions	£	£	Payslip / tax return	<input type="checkbox"/>
Mortgage interest if main residence is owned	£	£	Current mortgage statement	<input type="checkbox"/>
Mortgage capital payments on main home	£	£	Current mortgage statement	<input type="checkbox"/>
Any other interest payable	£	£	Bank, building society or statement for each amount	<input type="checkbox"/>
Any annual main rent payable on home	£	£	Tenancy/ rental agreement	<input type="checkbox"/>
Annual council tax charge	£	£	Council tax statement	<input type="checkbox"/>
Credit card / loan repayments	£	£	Letter and statements	<input type="checkbox"/>
Personal insurances (ie medical)	£	£	Annual statement	<input type="checkbox"/>
Any maintenance payments made	£	£	Copy of court order or separation agreement	<input type="checkbox"/>
Monthly/ annual contributions to other family members	£	£	Highlight on bank statements - 3 months	<input type="checkbox"/>
Approx spent on holidays in the past year (flights, accommodation, expenses)	£	£	Include brief description in section N	<input type="checkbox"/>
Other (eg childcare costs)	£	£	Include brief description in section N	<input type="checkbox"/>

Annual total 2020/21

£

£

K. Property details

Tick if documentary evidence supplied ✓

Main residence (please select)

owned / rented

Mortgage statement or rental agreement

Estimated value (if owned)

£

Outstanding balance on mortgage

£

Current mortgage statement

Final payment date

Current mortgage statement

Other property/properties owned at home or abroad which are not your main residence

Number of properties owned or partly owned

(If more than one please provide the information below for all properties on a separate sheet)

Estimated value

£

Outstanding balance on mortgage (if any)

£

Mortgage statement(s)

Annual council tax charge
(if **not** paid by tenants)

£

Annual council tax statement

Amount of annual rent income

£

Rental agreement

Amount of monthly mortgage repayments
(if any)

£

Current mortgage statement

L. Other assets

Tick if documentary evidence supplied ✓

Cash at bank (all accounts UK and/or abroad held)

£

Statements - 3 months

Estimated value of any investments

£

Valid statement(s)

Estimated value of any motor vehicles

£

Estimated value of any other assets
(boats, motorbikes etc)

£

Net worth of a business which you own or share

£

Year end accounts

Cash held anywhere, for any reason

£

Valid statement(s)

Value of any lump sum/redundancy payments received in the past 18 months

£

Letter from employer

Please indicate below reasons why assets cannot be converted or utilised to pay school fees:

M. Liabilities

*Tick if documentary
evidence supplied ✓*

Credit card/s debt

£

Statements - 3 months

Any loans/ debt

£

Statements

If there are any other liabilities or commitments which you feel should be taken into account, please provide details below:

N. Additional information

Please list any additional information which may affect the assessment on an Award/ Bursary eg significant changes in income or outgoings for the incoming year (such as planned retirement). Please give details if you have approached any other bodies for funding of your daughter's education. Continue on a separate sheet if necessary.

O. Verification

Documentary evidence must be submitted in support of all income, expenditure and assets declared on this form. Where the appropriate document is not available, please enter the date by which you will be able to produce it but do not delay the return of this form. Failure to provide all documentation could delay the assessment of your application. **Please provide photocopies not originals.**

	Documentation supplied <i>Tick all that apply ✓</i>	OFFICE USE ONLY Evidence validated
Latest P60 and last 3 months' payslips	<input type="checkbox"/>	<input type="checkbox"/>
P11D for benefits in kind	<input type="checkbox"/>	<input type="checkbox"/>
HMRC self-assessment tax return	<input type="checkbox"/>	<input type="checkbox"/>
End of year business accounts	<input type="checkbox"/>	<input type="checkbox"/>
Tenancy agreement (if renting)	<input type="checkbox"/>	<input type="checkbox"/>
March pay advice or other verification of pension contributions in 2020/2021	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements for all accounts - 3 months	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage statements (for all properties)	<input type="checkbox"/>	<input type="checkbox"/>
Annual council tax statement	<input type="checkbox"/>	<input type="checkbox"/>
Benefits statements - for all declared	<input type="checkbox"/>	<input type="checkbox"/>
Court orders / separation agreements	<input type="checkbox"/>	<input type="checkbox"/>
Annual statement of any personal insurance(s)	<input type="checkbox"/>	<input type="checkbox"/>
Loan or credit card statements - 3 months	<input type="checkbox"/>	<input type="checkbox"/>

Other (please specify below):

Moon Hall Schools Educational Trust reserves the right to request any other documentary evidence it deems necessary to support the details declared.

Declaration to be signed by both parents

I/ We declare that I/we have read the Guidance Notes that accompany this form and understand the definition of 'parent' for the purposes of the Bursary award application.

I/We declare that to the best of my/our knowledge and belief all the particulars given above and overleaf are true and contain a complete statement of my/our total annual income from all sources and assets. I/we undertake to notify the school of any change in my/our financial circumstances after signing this form.

I/We would/would not be willing to accept a full fee paying place if a Bursary/Financial Aid is not available.

We understand that the provision of false information may lead to my/our child being disqualified from the bursary scheme.

Father: _____ **Date:** _____

Mother: _____ **Date:** _____

If the above declaration is signed by only one parent, please state the reason below.

This form should be completed and returned to:

Private & Confidential:
The Bursar
Moon Hall School
Flanchford Road
Leigh, Surrey
RH2 8RE

Or emailed to: caveneyt@moonhall.co.uk

Failure to submit this form within the deadline specified above may result in the School being unable to make an assessment and consider the offer of a Bursary Award.

Data Protection Policy

This information provided is confidential and required solely for the purpose of assessing an applicant's entitlement to support with the tuition fees at Moon Hall Schools Educational Trust. It will be stored securely in the finance office (where it may be inspected by the applicant(s) provided that at least 48 hours advance notice is given). It will be disposed of securely within 12 months of the student leaving the school, if application is successful, and within three months of the start of the academic year, if application is unsuccessful.

Moon Hall Schools Educational Trust is registered in England at Flanchford Road, Leigh, Surrey RH2 8RE.
Registered company No 02485159.