

CONFIDENTIAL BURSARY APPLICATION FORM

The form should be completed and returned to the Bursar no later than:

For 16+ applicants looking to join the College in September 2024: 31 October 2023

For 11+ applicants looking to join the College in September 2024: 5 January 2024

For 13+ applicants looking to join the College in September 2026: 5 January 2024

Forms submitted after these dates may not be assessed and therefore a bursary place may not be available.

Before completing this form, please read carefully the advice on Pages 9 to 10. Please ensure that all sections are completed as an incomplete form cannot be assessed.

1. Name of young person needing assistance:

Forename(s)		Last Name
Date of Birth	Nationality	Date of proposed entry into Epsom College and entry year group (<i>if not already enrolled</i>)
Address, including postcode		

2. Parent contact details:

	Father/Step Father	Mother/Step Mother
Full name		
Title		
Address		
Postcode		
Day time telephone number		
Evening telephone number		
Mobile number		
Email address		

3. Parent occupation details:

	Father/Step Father	Mother/Step Mother
Employment status	Employed/self-employed/unemployed	Employed/self-employed/unemployed
Occupation:		
Employers name, address and telephone number		
Are you a director or shareholder of the company	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
If YES, state proportion of Company owned:		

4. Bursary requested

Period for which bursary is required	From	To
Relevant annual Epsom College Fees - Day/Boarding etc. <i>(excluding extras)</i>	£	A
Value of any Bursary/Scholarship already offered by Epsom College <i>(where applicable)</i>	£	B
Amount you can contribute to fees	£	C
Any other financial assistance available <i>(please detail)</i>	£	D
Value of bursary requested (A - B - C - D)		£

5. Income *(see note)*:

Please enter below your current earnings and expected income from all sources for the tax years as detailed below:				
	Father/Step Father		Mother/Step Mother	
	To April 2023 (actual)	To April 2024 (estimated)	To April 2023 (actual)	To April 2024 (estimated)
a) Gross earned income	£	£	£	£
b) Benefits in kind	£	£	£	£
c) Any pension payments received	£	£	£	£
d) Student grants (not student loans)	£	£	£	£
e) Social Security benefits (including Child Benefit and Child Tax Credits)	£	£	£	£
f) Property income	£	£	£	£
g) Gross interest income received on all accounts	£	£	£	£
h) Other gross investment income	£	£	£	£
i) Dividends paid by company owned by parent	£	£	£	£
j) Is there a Court Order/Separation Agreement? If yes, please state annual maintenance or separation payments	YES <input type="checkbox"/> NO <input type="checkbox"/> £	YES <input type="checkbox"/> NO <input type="checkbox"/> £	YES <input type="checkbox"/> NO <input type="checkbox"/> £	YES <input type="checkbox"/> NO <input type="checkbox"/> £
k) Redundancy/severance payments	£	£	£	£
l) Any other income or gains not included above	£	£	£	£
Total of income included above	£	£	£	£

6. Outgoings:

Please enter below your current outgoings and expected outgoings for the tax years as detailed below:				
	Father/Step Father		Mother/Step Mother	
	To April 2023 (actual)	To April 2024 (estimated)	To April 2023 (actual)	To April 2024 (estimated)
a) Tax payable on income declared above (including any tax deducted at source)	£	£	£	£
b) National Insurance Contributions	£	£	£	£
c) Pension or superannuation contributions (net)	£	£	£	£
d) Mortgage repayments (include capital repayment as well as interest)	£	£	£	£
e) Any other interest payable e.g. overdrafts, credit cards, loans, etc (please specify)	£	£	£	£
f) Annual rent payable on principal residence	£	£	£	£
Total of outgoings included above	£	£	£	£

7. Capital Assets *(see note)*:

a) Do you own or rent your home?	OWN <input type="checkbox"/> RENT <input type="checkbox"/>
b) Approximate market value of owned home	£
c) Approximate value of other possessions including house contents, car, collections, paintings, jewellery etc.	£
d) Cash at banks or elsewhere	£
e) Approximate value of any other assets (<i>shares PEP, ISAs etc.</i>)	£
f) Approximate value of any other assets not included above	£
g) Net worth/value of any businesses which you own or share	£
h) Approximate value of your interest in any other property, land or buildings either at home or abroad	£
i) Are any of the above properties rental properties	YES <input type="checkbox"/> NO <input type="checkbox"/>
j) List the addresses below of all the owned properties include in h) above, with a value for each one a. Postcode b. Postcode c. Postcode	
k) Other assets not listed above	£
Total assets included above	£

8. Capital Liabilities *(see note)*:

a) Outstanding mortgage (main property/family home)	£
b) Total of all other outstanding mortgages referred to in 7j) above	£
c) Total of any current overdraft	£
d) Total of all loan balances outstanding	£
e) Do you have any other charges listed against the properties you own?	YES <input type="checkbox"/> NO <input type="checkbox"/>
f) If the answer in e) above is yes, please state the property address and the value of the charge a. Postcode b. Postcode c. Postcode	
Total liabilities included above	£

9. Net Assets

Total Assets (section 7)	£
Total Liabilities (section 8)	£
Net Assets (section 7 less section 8)	£

10. Dependent children *(see note):*

<i>Include the child to whom this application refers: if more than 4 children, give details on a separate sheet</i>				
	1	2	3	4
Forename				
Date of Birth				
School or College				
Boarding or Day				
a) Annual school or other educational fees <i>(excluding extras and sundry disbursements)</i>	£	£	£	£
b) Compulsory additional school charges	£	£	£	£
c) Do you have the benefit of a court order for the payment of school fees?	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>	YES <input type="checkbox"/> NO <input type="checkbox"/>
d) If yes, please state the amount paid in respect of the current school year	£	£	£	£
e) Amount of fees shown above covered by other sources such as Scholarships, bursaries or other allowances, employer's education allowances, insurance policies or assistance from other sources (e.g. grandparents)	£	£	£	£

a) Do you owe fees at any other school?	YES <input type="checkbox"/> NO <input type="checkbox"/>
b) If yes, name of school and amount owed	£

11. Other dependents *(see note):*

Please give details of any other dependents:
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12. Assistance from other sources

In order to help the greatest number of parents who need financial assistance, all those who apply for a bursary from the school are asked first to enquire if they are eligible for assistance from any other source.

Please state whether you have applied to trusts or foundations for a grant, and if so to which and with what result.

13. Any other information

Please include any other information that would be helpful for the school to consider when reviewing your application.

14. Supporting Documentation

Where relevant, the College requires sight of the following documents to support the bursary application. Please tick the relevant boxes below to indicate which documents are being submitted with this application. Please only send photocopies as it may not be possible to return the original documentation.	
<input type="checkbox"/>	P60(s) to April 2023
<input type="checkbox"/>	March 2023 payslip(s) and most recent payslip(s)
<input type="checkbox"/>	P45 (if left employment since April 2022 and evidence of redundancy/severance package)
<input type="checkbox"/>	Inland Revenue Self-Assessment Tax Return (all pages) for the year ended 2022/23
<input type="checkbox"/>	Inland Revenue Tax Calculation for the tax year 2022/23
<input type="checkbox"/>	Copy of business accounts (profit/loss/expenses) if the applicant is a majority shareholder, director or the proprietor
<input type="checkbox"/>	All Social Security benefits for the tax year 2020/21 (income support, housing benefit etc.)
<input type="checkbox"/>	Court order and details of any maintenance payments (CSA, court order required or informally agreed)
<input type="checkbox"/>	Last 3 months bank statements for all accounts and evidence of stocks and shares etc.
<input type="checkbox"/>	Latest rent statement for the property in which you reside, if not owned
<input type="checkbox"/>	Latest mortgage statement for all properties owned
<input type="checkbox"/>	Council Tax bill for 2022/23 for the property in which you reside
<input type="checkbox"/>	Copies of all loan agreements plus most recent statement of account

15. Declaration

After having read the attached notes, the following declaration should be signed by both parents:

We/I have read the notes and have made a complete and accurate declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for him/her at the school, the following terms and conditions will apply between ourselves/myself and Epsom College:

- a) Our/my child's fees account with Epsom College will be credited termly with the amount of the bursary for so long as the award remains in effect.
- b) Any award of a bursary is subject to annual review and we/I must complete an annual declaration of our/my financial circumstances and supply all relevant supporting evidence by the return date indicated.
- c) We/I will report immediately any material change in the financial position declared.
- d) The Bursary may be withdrawn or reduced if:
 - i. we/I act or our/my child acts in breach of the College's Terms and Conditions;
 - ii. we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iii. we/I have failed to produce any additional information required by the College to evidence our/my financial circumstances;
 - iv. in the opinion of the Headmaster, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;
 - v. we are/I am more than 28 days in arrears in respect of any amount due and owing to the College;
 - vi. there is a material change in our/my financial circumstances;
 - vii. the College's resources are insufficient to maintain the level of award.
- e) The Bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child's fee account will become repayable to Epsom College forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary.

Signature:	Signature:
Print name:	Print name:
Date:	Date:
Parent/Guardian	Parent/Guardian

In the case of the declaration only being signed by one parent, please circle as appropriate:

Divorced

Widowed

Separated

Bursaries are awarded at the full discretion of Epsom College

ADVICE ON COMPLETING THIS FORM

Before completing the form, please read these notes carefully, and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

Clear writing and keeping a copy. Please write in capital letters and in black ink, as this form may need to be photocopied. We advise you to keep a copy of what you write.

Full answers. Please answer all sections as fully as possible – gaps could delay the processing of your application.

The School reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling, and all questions must be answered by entering a description or figure. If a question is not applicable please indicate by writing N/A.

SECTION 2: PARENTS/APPLICANTS

These are defined as:

- the natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or
- the parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or
- where none of the above applies, the parent is the person with whom the pupil normally resides in accordance with any informal care or fostering arrangement and that person's partner (if any) where the partner normally resides with that person and the pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father will be required to complete and sign a Bursary Application Form, either independently or jointly.

SECTION 5: INCOME

Please include the gross annual amount of earned income, either a salary or wage, or profits from a business or profession. Include any earnings from profit related pay, part-time employment and any sums received as a bonus, commission etc, statutory sick pay, statutory maternity pay giving the gross amounts (before deduction of tax, NI, superannuation, etc) for the year ended April 2022 and an estimated figure for the year ended April 2023.

Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities etc) should also be entered gross of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed gross.

Income from letting or subletting of a property should include the amount of the profit declared to HMRC; net of any related expenditure before tax.

SECTION 7: PARENTS' /APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the College takes account of the following assets:

- The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares, should be valued as near as possible to the date of submitting the application form.
- The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.
- If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- In the case of second homes and/or other properties, these should also be included at their estimated current market value.

SECTION 8: PARENTS' /APPLICANTS' CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

SECTION 10: DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution.

Figures used should relate to the current academic year.

Members of HM Forces and Diplomatic Service should include the amount of any Education allowances which they receive and parents in other occupations should include any similar sum provided by their employer to assist with the payment of school or university fees.

If an insurance policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil will not be eligible for a bursary. Where a Trust has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.

Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants.

SECTION 11: OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a grant, e.g. a known significant change in income or outgoings for the coming year.

CONFIDENTIALITY

The school respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.



EPSOM
COLLEGE

SEND YOUR COMPLETED FORM TO

The Bursar's Office,
Epsom College,
College Road,
Epsom,
Surrey, KT17 4JQ

Or email to bursar@epsomcollege.org.uk