

Application Form for a Bursary for the 2024-2025 Academic Year

**Restricted to Day Pupils who will then be in School Years 7 or 8 at schools
located in Surrey, Hampshire and West Sussex**

Confidential

Important notice

The Heights Educational Bursary Trust will be closed at the end of 2025. Bursaries will be awarded this year for the last time for one child per family for the 2024-2025 academic year and will be restricted to pupils who will be in School Years 7 and 8 for that academic year



**THE HEIGHTS EDUCATIONAL
BURSARY TRUST**

Registered Charity No. 294944

Please read the Guidance Notes on pages 10 to 14 before completing this form

NOTE: This form is based on the form recommended by the Independent Schools' Bursars Association

1. CHILD		
a	Full Name Nationality	
b	Date of Birth	
c	School Year in September 2024	

2. PARENT CONTACT DETAILS (see note 2)			
		Father/Stepfather	Mother/Stepmother
a	Full Name Nationality		
b	Full Address (including the post code)		
c	Daytime Tel		
d	Evening Tel		
e	Mobile Tel		
f	Email Address		

3. PARENTS' OCCUPATIONS			
a	If employed: Employer's name, address and phone number Your job title		

b	<p>If self-employed:</p> <p>(i) Name and type of your business and from where it is operating.</p> <p>(ii) Your job title</p> <p>(iii) Registration number of your company/ business (if applicable):</p>	Father/Stepfather	Mother/Stepmother
c	<p>Are you a director or the sole or a co-owner of the company or business?</p> <p>If "Yes" then what are the percentage shares of the business which you and/or your spouse/partner have owned for the last two trading years</p>		
d	<p>If unemployed:</p> <p>(i) for how long have you been unemployed?</p> <p>(ii) Nature of your last employment and your last full year's earnings</p>		
e	<p>If retired:</p> <p>(i) when did you retire?</p> <p>(ii) at what age did you retire?</p> <p>(iii) Do you intend to go back to work?</p>		

4. INCOME (See Note 4) <i>(Please enter below your earnings from all sources for the 2023-2024 tax year)</i>			
		Father/Stepfather	Mother/Stepmother
a	If employed: your Gross Salary and other emoluments (including all bonuses, benefits, redundancy and ex gratia payments and benefits received)		
b	If self-employed: your taxable profits for the last two annual accounting periods and your expected profits for the next period		
c	Gross pensions received by you if applicable (including State and personal pensions and retirement annuities)		
d	Gross investment income from Banks, Building Societies, insurance companies, other securities, sources and assets		
e	Gross property rental profits for the last two annual accounting periods and known/expected profits for the 2023-2024 tax year		
f	Social Security Benefits (including Child Benefit, Working & Child Tax Credits, Universal credit, Disability Allowance, etc.)		
g	Separation maintenance allowance payments (please detail terms)		
h	Is there a Court Order/Separation Agreement?		
	If Yes, please state annual amount ordered payable, including for school fees		
i	Other benefits in kind received/receivable from your work		
j	Other receipts not included in (a) to (i) above, e.g., trust income		
k	Please provide copies of your HMRC self-assessment tax calculations for the 2022-2023 and the 2023-2024 tax years		

5. OUTGOINGS (see note 5)			
		Father/Stepfather	Mother/Stepmother
a	Tax payable on income declared above (<i>including tax deducted at source</i>)		
b	National Insurance Contributions		
c	Pension or superannuation contributions (net)		
d	Mortgage repayments (<i>include capital repayment as well as interest</i>)		
e	Endowment mortgage insurance premiums		
f	Any other interest payable e.g., overdrafts, credit cards, loans etc. (<i>please specify</i>)		
g	Annual rent payable for your principal residence, if applicable		

6. CAPITAL ASSETS (see note 6)			
		Father/Stepfather	Mother/Stepmother
a	Approximate current market value of all such assets, e.g.:		
	<ul style="list-style-type: none"> Building Society, Bank deposits/National Savings, etc. 		
	<ul style="list-style-type: none"> Equity investments, shares, bonds, Government stocks, etc. 		
	<ul style="list-style-type: none"> PEPs, ISAs, TESSAs, TOISAS, SIPP(s), pension fund(s), etc. 		
	<ul style="list-style-type: none"> Life assurance, Bonds, endowment policies, etc. 		
b	Approximate market value of principal residence (<i>state if freehold or leasehold</i>)		
c	Approximate market value of other assets and possessions including house contents, motor vehicles, boats, art, jewellery, collections, etc.		
d	Cash held by you or on your behalf at Banks or other deposit holders and by third parties		
e	Approximate value of investment policies maturing in the 2023-2024 and 2024-2025 tax years; proceeds of sale of capital assets, surrenders of life & investment policies etc.		

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f	Net worth/value of any businesses or private companies which you own or have a share/shares in		
g	Approximate market value of (i) any second homes or other properties you own or co-own, and (ii) your car(s) and other vehicles		
h	Redundancy, employment termination or lump sum payments received/due in the 2022-2023 and 2023-2024 tax years		
i	Monies that are owed to you and repayment terms		
j	Other assets (e.g., share options, trust interests or assets held on your behalf by a third party)		

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7. CAPITAL LIABILITIES (see note 7)			
		Father/Stepfather	Mother/Stepmother
<i>(Please give details of any capital charges against the assets declared in Section 6)</i>			
a	Mortgage Details		
	<ul style="list-style-type: none"> Amount currently outstanding on your principal residence 		
	<ul style="list-style-type: none"> The final payment date 		
b	Other loans and liabilities <i>(please specify and provide details)</i>		

8. NET ASSETS			
		Father/Stepfather	Mother/Stepmother
	TOTAL ASSETS (Calculated from Section 6)		
	LIABILITIES (Calculated from Section 7)		
	NET ASSETS (Calculated from Sections 6 & 7)		

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Please explain why some of your net assets cannot be sold, converted into cash and utilised towards payment of school fees.

Holiday profile: please outline your family's foreign and UK holidays taken during 2023 or planned for 2024 including the approximate costs incurred.

9. DEPENDENT CHILDREN (See note 9)

(Include the child to whom this application refers and if more than 4 children, give details on a separate sheet)

		1	2	3	4
a	Full Name:				
b	Date of Birth				
c	Current School or College				
d	Boarding or Day				
		£	£	£	£
e	Current annual school or other educational fees <i>(excluding extras & disbursements)</i>				
f	Current compulsory additional school charges				
g	Amount of fees shown in (e) covered and paid by way of:				
	<ul style="list-style-type: none"> Scholarships, bursaries or other allowances given by the school/college etc. 				
	<ul style="list-style-type: none"> Annual sum(s) arising from a capital repayment scheme 				
	<ul style="list-style-type: none"> Services/Diplomatic/ Company Education Allowances (gross) <i>(state whether sum is included in gross salary at 4 (a))</i> 				
	<ul style="list-style-type: none"> Annual sum(s) received arising from education insurance policies 				

	<ul style="list-style-type: none"> Assistance from any other sources to help you pay school fees e.g. Grandparents, relatives, trusts, charities, local authorities, etc. 				
h	Annual income of your child <i>(please provide full details)</i>				
	Capital Value of any trust benefitting, or asset held for your child.				

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10. OTHER DEPENDENTS (See note 10)
Please give details of such persons, including: their names, their relationship with you, the nature of the support you give to them, and state for how long they have been financially dependent upon you and give a brief summary of their own financial position both as to capital assets and income and outgoing – add an extra page if necessary.

11. VERIFICATION OF INCOME				
Please enclose documentary evidence in support of the income figures in Section 4. Please tick those you are enclosing:				
	P60 & P11D		Copies of your last two HMRC tax calculations issued under Self-Assessment	
	Last 4 Payslips		Confirmation of Schedule D self employment income from an independent accountant	
	Last Annual Report, full Accounts & Balance Sheet		Of your company or business	
	Court Orders & Legal Separation agreements		(i.e., those covering the payment of school fees and child maintenance)	
	Benefits Received		e.g., Social Security Benefit, Housing Benefit, Job Seeker's allowance, Employment & Support Allowance, Income support, (continued over)	

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	Benefits Received (continued from above)		Disability Living Allowance, Incapacity Benefit, Child Benefit, Universal Credit, any other State benefits	
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12. VERIFICATION OF ASSETS Please enclose documentary evidence of capital assets and tick those you are enclosing:

	Property Valuation or source(s) of your valuation	£	Valuations of other investments	£
	Mortgage Statement	£	House Contents Insurance policy	£

13. Virtual meeting and duration of financial help available

<ul style="list-style-type: none"> The Trust's Bursar may wish to have a telephone call, or a virtual meeting with you using the Zoom videotelephony service, to discuss your application for a bursary for your child. Please indicate here if you would be willing to participate in such a meeting. Please Note that if a bursary is awarded for your child for the 2024-2025 academic year no further bursaries will be awarded to you for any child for subsequent academic years because the Trust will be closed at the end of 2025. 	<p>Yes/No (Delete as appropriate)</p>
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ASSISTANCE FROM OTHER SOURCES

PLEASE NOTE that to enable the Trust to help the greatest number of parents with payment of school fees, you should first seek financial assistance from the school your child will be attending; so, please state here whether you have done so and the outcome of your request or if you have not then why not.

14. DECLARATION

Having read the Notes for Guidance below and the Trust's Bursary Policy, the following declaration should be read and then be signed and dated by all parental applicant(s):

We/I have read the Notes for Guidance below, and the Trust's Bursary Policy and now declare that we/I have made a complete, accurate and truthful declaration of our/my income, outgoings, capital assets and liabilities and of our financial and family circumstances and of our child's capital and income.

Our/my child's school and his/her forthcoming year group are as stated below: [please insert in the spaces below: (i) the name of the school, and (ii) your child's year group for the 2024-2025 Academic Year - which year group must be in Years 7 or 8]:

.....
[School for the Academic Year 2024-2025]

.....
[Year Group]

We/I understand and agree that if we are/I am offered a bursary for our/my child for the 2024-2025 Academic Year then the following terms and conditions will apply to the bursary as well as any other terms and conditions which may be included in any offer letter that may be sent by the Trust to us/me for such a bursary:

- 1) Payment will be made by the Trust directly to the school by three equal sums shortly before the beginning of each term of the Academic Year.
- 2) Each payment will only be made if the school confirms to the Trust beforehand that we/I have paid our/my share of the school fees for the forthcoming term or that we/I have in place and have fully complied with an agreed arrangement for payment of school fees by instalments.
- 3) Payment of the bursary is dependent upon the Trust's resources remaining sufficient to meet such payment and shall not be taken by us/me as a commitment by the Trust that a similar or any bursary will be awarded for our/my child for the subsequent academic year for which we may apply.
- 4) In exercising their discretion, the Trustees: (i) may ask the Trust's Bursar to contact the Head of our/my child's school and then to report back to the Trustees about such matters as: the progress our/my child has made in school, our/my child's attitude and behaviour at school, the support we/I have given to the school, whether we/I have paid all fees due to the school in a timely manner, (ii) will consider all of our/my family circumstances and finances, as disclosed by us/me, and (iii) may invite us/me to attend a virtual meeting online with the Trust's Bursar to discuss our/my application.
- 5) We/I agree and undertake with the Trust:

- a. to keep the amount of any bursary awarded for our/my child confidential and not to disclose its terms to other parents or third parties (excepting to HMRC or our accountant or financial adviser),
- b. to notify the Trust's Bursar promptly about any favourable material changes in our/my financial circumstances that occur from the date of our signatures below and throughout the coming 2024-2025 Academic Year, and
- c. that upon demand being made by the Trust we/I will promptly repay the amount of the bursary awarded for our child which has been paid by the Trust if the information we/I have provided to the Trust in support of our/my application is untrue or materially misleading or if we/I breach any of these terms and conditions, or any of the terms and conditions of the bursary offer letter, or the education contract made between us/me and the school.

Name(s) and signature(s):

Parent/Guardian Date2024

Parent/GuardianDate2024

[NB. Each person with parental responsibility for the child is required to sign this form and the Trust is entitled to treat any information received from any person who has signed this form as having been provided on behalf of both or all such persons.]

GUIDANCE NOTES FOR COMPLETION OF THIS BURSARY APPLICATION FORM

Before completing this form, please read these notes and the Trust's Bursary Policy carefully and contact the Bursar if further information or advice is required. These notes refer to the corresponding sections of this Application Form. The Bursary Policy is posted on the Trust's website.

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

All financial values should be shown in Sterling. References to Her Majesty's Customs & Excise (HMRC) include the relevant Taxation Authority.

2. PARENTS

Parents are defined as:

- the natural father and mother of the child where they live together, whether they are married to each other, and whether 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
- the child's guardian appointed in accordance with section 5 of the Children Act 1989 and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or
 - the person with whom the child resides in accordance with either:
 - i. a subsisting residence order made under section 8 of the Children Act 1989; or
 - ii. any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or
 - iii. where a pupil either has no parents as defined above or the Trust is satisfied that no such parents can be found, and he/she is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the pupil shall be treated as one whose parents have no income for the purposes of the scheme; 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 school, both mother and father will be required to complete and sign the Application Form.

4. INCOME

- (a) The GROSS annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc., statutory sick pay, statutory maternity pay giving GROSS amounts (before deduction of tax, NI, superannuation, etc.) for the 2023-2024 financial year. Taxable benefits in kind agreed with HMRC should also be shown (e.g., free or subsidised housing, meals, petrol, cars, etc.) at the amount agreed for taxable purposes.
- (b) Profits from a business or profession – being the amount of GROSS profits agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances, losses and stock relief). Copies of the last two sets of annual accounts should be included.
- (c) Please provide pension payment statements if any such payments are received.
- (d) All other Investment income (e.g., interest or National Savings Bank deposits; dividends, annuities etc.) should 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.
- (e) Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC. Accounts for the last two annual accounting periods should be produced together with details of the current gross monthly rent received.
- (f) All social security and state benefits received should be declared and the type of benefit specified.
- (g) Court Orders, Legal Separation Agreements and Voluntary Arrangements for school fees – where a parent is required by a Court Order, or a legal binding separation agreement (e.g., Deed of Separation) to pay part of the

school fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any bursary to be awarded. This is irrespective of whether the order or agreement is being complied with. Where the whole amount of fees is required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a bursary. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

- (h) Please provide a copy of the order or agreement.
- (i) Include free benefits in kind agreed by HMRC and not subject to tax, e.g., representative occupation of house, free meals etc.
- (j) Also include royalties.
- (k) Also provide copies of your pay slips for January, February, March and April 2024 or if self-employed then details of your drawings taken on account of profits for the last six months.

5. OUTGOINGS

- a) Enter Income Tax and tax on unearned income SEPARATELY.
- b) These should be shown on your latest Payslip or in your business records.
- c) Enter your annual superannuation contributions to Pension Schemes.
- d) Enter capital repayments as well as interest payments on a mortgage for your principal residence.
- e) Only complete this if repayment is to be made by means of an Endowment Policy.
- f) Provide copies of most recent statements for these loans/debts and include bank overdraft and other loan charges incurred during the year and specify the purpose of the loan(s) and the credit received.
- g) Provide details of your lease/rent agreement and a copy of the last rent demand.

6. CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the Trust will also take account of the following assets:

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society and investments in stocks and shares, valued as near as possible to the date of submitting the application form.
- b) The current market value of your principal residence estimated by using online property valuation sites and the online sites used should be identified.
- c) These values should be supported by a contents insurance policy, a professional valuation or in the absence of the same then fairly estimated by you.
- d) Copies of recent statements should be provided.

- e) Details should be provided with valuations.
- f) If you run your own business or are partners in a business, then you should make a fair estimate of the current net worth of the business (i.e., what you/they would be willing to sell the business for). Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company at its last financial year-end.
- g) Provide the postal address and a brief description of the property, its approximate current market value in sterling. No deduction should be made for any outstanding mortgage or loans.
- h) Provide copies of the related redundancy notice and payment statements.
- i) Provide details of the loan, its term and repayment date.
- j) Provide the appropriate supporting documentation with valuations.

7. CAPITAL LIABILITIES

Details and supporting documentary evidence of these liabilities should be provided along with the name and address of the lender(s).

8. NET ASSETS

Self-explanatory

9. DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying for a bursary. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution and are financially dependent upon you.

- The financial figures to be inserted in panel g refer to the 2023-2024 Academic Year.
- Members of HM Forces and Diplomatic Service should include in panel g the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum if received.
- In panel g, re insurance policies for school fees: if any insurance policy for the payment of school fees exists, then the amount to be declared is the amount received or to be received under the policy for the 2023-2024 and 2024-2025 Academic Years. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a bursary. The types of policy concerned are those which stipulate that the employer/company shall pay the school fees, in whole or in part, to the school in respect of the pupil.
- Where a trust has been established in favour of the child for whom you are applying for a bursary, details of the annual amount available and the date

of commencement of payments by the trust should be given in panel g.

- Where the child has any unearned income, e.g., interest from National Savings, bank or building society deposits, Junior ISAs or receives share dividends, you should enter in panel h the source of income and the gross amount received before deduction of any tax. Do not include any income from part-time employment or any student grants. You should also enter in panel h the capital value of any investment, security or trust set up for your child.

10. 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 their age, address, condition, etc.

OTHER RELEVANT INFORMATION

Please enter on page 15, and on a separate sheet if necessary, any information which you would like the Trustees to take into account when considering your application, such as: a significant change in the family's capital assets or income or outgoings during the last 12 months, or a serious illness in the family or any medical problems and disabilities suffered by you, your child or any member of your family.

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CONFIDENTIALITY

PLEASE NOTE THAT the Trust respects the confidentiality of all bursaries awarded and all successful Applicants are expected to do likewise in respect of any bursary awarded to their child.

PLEASE ALSO SEE THE NEXT PAGE

NOTE: This Page is left Blank for any additional information you would like the Trustees to take into account when considering your application, such as that mentioned above on Page 14 under the heading 'Other Relevant Information'. [Please add another sheet or sheets if necessary.]

[14.04.2024 – d3]

**End of Application Form for a Bursary for the 2024-2025 Academic Year
The Heights Educational Bursary Trust Limited**