

Bursary Application Form – School Year 2024-2025

Guidance for completing this form

- Completed Bursary applications for the 2024-2025 school year, together **with all supporting evidence**, must be received at the school no later than **Friday 19th April 2024**.
- Children in receipt of Early Years Funding (EYF) **will not** be eligible for a bursary for any terms in which EYF is claimed (the term following a child's third birthday until the term after their fifth birthday).
- Please use the checklist at the back of this form to ensure all copies of requested documents have been included.
- Applications can only be assessed from the date they are received completed **with all required information**.
- Please supply photocopies of requested documents **only**.

The following principles apply

- The school's decision is final and is made at the absolute discretion of the school.
- We offer a bursary on the principle that it is the **last resort** for funding of school fees. Applicants must consider all other possible sources of funding before turning to the school.
- The school has a finite/limited budget for Bursary.
- Consideration will be given to all applicants, current recipients of a bursary, families already in the school and new applicants.
- **State Benefits** - it is a requirement of our fee assistance programme that you must apply for all state benefits to which you are entitled **before** seeking a Bursary. We require copies of the relevant award notices, as stated on the form. We will not accept forms where the state benefit section is incomplete.
- Families are expected to have explored every avenue to increase their income including claiming all benefits to which they may be entitled.
- Families whose income is reduced by a lifestyle choice will not be eligible.
- Parents who apply for Bursary are expected to make reasonable endeavours to obtain a contribution to school fees and living costs from the other/absent parent.

Granting of a Bursary is subject to the following conditions

- Payment of remaining fees is by **ten equal monthly** amounts paid by standing order commencing from on the Autumn Term, **1st September 2024**. Unless by other agreement with the school Bursar.
- All prior debts to the school are either repaid or subject to an agreed repayment plan.

All families are required to submit bank statements for all bank account/s for a three month period prior to submission of this Bursary Application Form, in addition to the items requested below.

SECTION A – PUPIL AND PARENT DETAILS

Please tick here if you have **applied** for a bursary in the last two years

☐ (tick box)

Please tick here if you are **in receipt** of bursary for the current school year

☐ (tick box)

Full name of each pupil	Class/Kindergarten from Sept 2024	For kindergarten, please indicate attendance from Sept 2024			Will this change during this academic year? If so, how?	Please indicate if Early Years Funding will be used this year?*	
			Am	Pm		Autumn Term	Y / N
		Mon				Spring Term	Y / N
		Tue				Summe r Term	Y / N
		Wed					
		Thu					
		Fri					
		Mon				Spring Term	Y / N
		Tue				Summe r Term	Y / N
		Wed					
		Thu					
		Fri					
		Mon				Spring Term	Y / N
		Tue				Summe r Term	Y / N
		Wed					
		Thu					
		Fri					

**Please note guidance above regarding bursary eligibility for children in receipt of Early Years Funding*

	Full name of parent/guardian and partners who share the pupil's/pupils' main address	Relationship to pupil(s) (eg. mother, step-father, father's partner)	Daytime phone number
1			
2			

Parent/Guardian 1 Name: Address: Postcode: Email address: Number of other children under 18 resident: % of time pupil(s) spend at this address:	Parent/Guardian 2 Name: Address: Postcode: Email address: Number of other children under 18 resident: % of time pupil(s) spend at this address:
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SECTION B – INCOME FROM EMPLOYMENT

Include here income earned as an **employee**. Do not include self-employed income or income from any company of which you own more than 25% of the shares.

	Parent/Guardian 1	Parent/Guardian 2
Name		
Occupation		
No of hours per week worked		

	Parent/Guardian 1	Parent/Guardian 2	Documentation required	Office use only
Current gross annual income for 23/24	£	£	Most recent payslip	
Tax payable			Most recent payslip/ P60	
National Insurance			Most recent payslip/ P60	

SECTION C – SELF EMPLOYED INCOME

Complete this section if you are **self-employed** but do not own a limited company.

Nature of self-employed activity:
When did you commence this activity:
Do you have any business partners? If so, please provide details:

Self employed income must be verified by the provision of the following documentation in all cases:

1. Business accounts
2. A copy of your full tax returns for the last two tax years
3. Management accounts for the current year **or** personal current bank statements for the period April 2023 to April 2024

Provide ANNUAL figures:	Parent/Guardian 1	Parent/Guardian 2	Additional notes	Office use only
Actual gross income – average of last two years	£	£		
Tax payable	£	£		
National Insurance payable	£	£		

SECTION D – INCOME FROM YOUR OWN COMPANY OR LLP

Please complete this section if you **own 25% or more of a company or LLP.**

Name of company	Company number	Date of incorporation

Business activity of company

Ownership details (include names of shareholders and indicate if other shareholders are related to you)

Limited company and LLP income must be verified by the provision of the following documentation in all cases:

1. Financial accounts
2. A copy of your full tax returns for the last two tax years
3. Management figures for the period from the company year-end to April 2024

Provide ANNUAL figures:	Parent/Guardian 1	Parent/Guardian 2	Additional notes	Office use only
Salary drawn - average of last two years	£	£		
Dividend income – average of last two years	£	£		
Any other cash drawings – average of last two years	£	£		
Tax payable for 2023/24	£	£		
National Insurance paid for 2023/24	£	£		

SECTION E – WORK RELATED CHILDCARE COSTS

Childcare costs incurred solely for the purpose of work	£	£	Receipts or invoices for 2023-24 tax year	
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SECTION F – INCOME FROM STATE BENEFITS

It is a mandatory requirement of fee assistance that applicants apply for, obtain and declare all state benefits to which they are entitled before requesting fee assistance. Please see guidelines on page one for further information in filling out this section.

Provide ANNUAL figures for 23/24	Parent/Guardian 1	Parent/Guardian 2	Documentation required	Office use only
Child benefit	£	£	Latest award notice	
Child tax credit	£	£	Latest award notice	
Working tax credit	£	£	Latest award notice	
Housing benefit	£	£	Latest award notice	
Council tax benefit	£	£	Latest award notice	
Income support	£	£	Latest award notice	
Job seekers allowance	£	£	Latest award notice	
Widow/ers benefit	£	£	Latest award notice	
Other state benefit	£	£	Latest award notice	

SECTION G – OTHER INCOME

Provide ANNUAL figures for 23/24:	Parent/Guardian 1	Parent/Guardian 2	Documentation required	Office use only
Income from lodgers	£	£	Relevant bank statement with income highlighted	
Any sum over £200 in aggregate that you receive from friends or family, including payment of school fees	£	£	Relevant bank statement with income highlighted	
Any other income including investment, pension etc	£	£	Copy of recent statement	

Details of other income:	
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SECTION H – DETAILS OF PUPILS’ MAIN RESIDENCE

Homeowners - Complete the following if you **own** or part-own the property that you live in.

		Documentation required	Office use only
Market value of the property	£	Valuation if available	
Mortgage outstanding	£	Latest statement	
Mortgage CAPITAL payment for last 12 months	£		
Mortgage INTEREST payment for last 12 months	£		
Annual Council Tax payable for 23/24	£	Latest advice notice	

Tenants - Complete the following if you are a **tenant** in the property that you live in.

Current Annual Rent	£	Rental agreement	
Annual Council Tax payable	£	Latest advice notice	

SECTION I – SECOND AND SUBSEQUENT PROPERTIES

Please complete this section if you own or part-own a property **which is not your main residence**. If you own two or more such properties, provide aggregate figures.

	Parent/Guardian 1	Parent/Guardian 2	Documentation required	Office use only
Market value of property	£	£	Valuation if available	
Mortgage outstanding	£	£	Latest statement	
Mortgage CAPITAL payment for last 12 months	£	£		
Mortgage INTEREST payment for last 12 months	£	£		
Gross annual rental income before tax (if any)	£	£	Accounts	

Address of second or subsequent property/ies:

If you part-own this property, please give details of the % owned, other owners and their relationship to you:

SECTION J – OTHER CAPITAL ASSETS

	Parent/Guardian 1	Parent/Guardian 2	Documentation required	Office use only
Savings accounts	£	£	Latest statement	
Savings bonds or similar	£	£	Latest statement	
Stock market investments	£	£	Latest valuation	
Other significant assets* total	£	£	Please complete sections below	

*Other significant assets include any items you own worth more than £3,000 eg. vehicles, jewellery, art, furniture, electronic equipment etc (please detail below and continue on a separate sheet if necessary).

Item Description	Current Value
	£
	£
	£
	£
	£
	£
	£

Please detail here all vehicles you own (whether outright or through lease/PCP and regardless of value):

Vehicle make, model & registration number	Date of purchase	Current value	Outstanding finance	Documentation required	Office use only
		£	£	Purchase invoice and/or finance agreement	
		£	£	Purchase invoice and/or finance agreement	
		£	£	Purchase invoice and/or finance agreement	

SECTION K – MAINTENANCE INCOME

Please complete this section if you are **separated** from your child/ren's other parent.

We expect parents who apply for fee assistance to use reasonable endeavours to obtain a contribution to school fees and living costs from the absent parent.

When did you or your child/ren last have contact with your ex-partner?

Regular contact ☐ in the last 12 months ☐ in the last three years ☐ more than three years ago ☐

Are you in receipt of any of the following from your ex-partner?

	Amount per year	Documentation required
A contribution to school fees	£	Relevant bank statement with income highlighted
Maintenance income to cover living costs	£	Relevant bank statement with income highlighted

Contribution in kind, please give details:

Are you satisfied that your ex-partner is making reasonable overall contribution to the costs you incur in relation to your child or children? Yes ☐ No ☐

If no, please outline the attempts you have made to enforce payment of maintenance:

SECTION L – OTHER INFORMATION

Please use this space below to provide any further details which you feel may be useful in processing your application for fee assistance, including any other information about your personal financial situation that has not been covered above.

DECLARATION

I declare that the information provided on this form is a complete and truthful statement of (i) my income from all sources and (ii) my assets of all kinds.

I undertake to adhere to the conditions set out in the Bursary Policy (available online and from reception) and understand that any Bursary awarded may be withdrawn if I break these terms.

I agree that if any information provided by me is found to be false or incomplete, any and all fee discounts granted by the school will become immediately repayable as a debt.

I undertake to notify the school immediately should there be any material change to my financial circumstances. I understand that any bursary offered may be amended or withdrawn in this case.

If granted Bursary, I agree to make fee payments in full and on time, by monthly standing order or in accordance with the payment method and timetable agreed by the school Bursar.

I agree to be jointly and severally liable for this undertaking with Parent/Guardian 1/2.

Parent/Guardian 1	Parent/Guardian 2
Full name:	Full name:
Signature:	Signature:
Relationship to pupil:	Relationship to pupil:
Date:	Date:

Please return your form to Finance no later than Friday 19th April 2024 in an envelope clearly marked 'Confidential - Finance 2024/25', or send it to finance@ringwoodwaldorfschool.org.uk

"For information regarding our data protection policy, please navigate to [policies/general] on our website."

DOCUMENT CHECKLIST

Please use this list to ensure that you include all supporting documentation as incomplete applications cannot be processed.

Section	Document copy required	Enclosed?
All applicants	Bank statements for all current account/s covering the period April 2023 to April 2024	
B Income from employment	3 most recent payslip	
	P60 for 2023-24 (or 2022-23 if recent P60 is not yet available)	
C Self-employed income	Business accounts for 2022-23 and 2023-24	
	Full tax returns for 2022-23 and 2023-24	
	Management accounts for the current tax year OR personal current bank statements for the period April 2023 to April 2024	
D Income from company/LLP	Financial accounts for 2022-23 and 2023-24	
	Full tax returns for 2021-22 and 2022-23	
	Management figures from company year-end to April 2024	
E Childcare costs	Receipts/invoices for 2023-24 tax year	
F State benefits	Latest child benefit award notice	
	Latest child tax credit award notice	
	Latest working tax credit award notice	
	Latest housing benefit award notice	
	Latest council tax benefit award notice	
	Latest income support award notice	
	Latest job seekers allowance award notice	
	Latest widow/ers benefit award notice	
	Other state benefit award notices where relevant	
G Other income	Bank statement with income from lodgers highlighted	
	Bank statement with income from friends/family over £200 highlighted	
	Latest statement for other income/ investments/ pension etc	
H Homeowners	House valuation if available	
	Latest mortgage statement	
	Latest council tax advice notice	
H Tenants	Rental agreement	
	Latest council tax advice notice	
I Second and subsequent properties	House valuation if available	
	Latest mortgage statement	
	Rental income accounts	
J Other capital assets	Latest statement for savings/ bonds/ stock market investments/ other significant assets	
	Car purchase invoice and/or finance agreement	
K Maintenance income	Bank statement with income from ex-partner highlighted	
L Credit Report	Latest credit report. Free reports can be obtained via www.creditkarma.co.uk	

