



HAMILTON COLLEGE

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Governors' Bursaries Scheme 2012-2013

Declaration of Income and Application for Assistance with Tuition Fees

PLEASE READ THE ATTACHED NOTES CAREFULLY AND THEN COMPLETE
THE FORM IN BLOCK LETTERS USING BLACK INK

THE INFORMATION ON THIS FORM WILL NOT BE PROCESSED ELECTRONICALLY AND IS SUBJECT TO THE
TERMS OF THE DATA PROTECTION ACT 1998

PLEASE NOTE THAT BURSARIES ARE AWARDED DEPENDENT UPON AVAILABLE FUNDS

CHILD'S FULL NAME _____ DoB _____

Year Group (2012/13) _____ Current School _____

Full name of Father/Stepfather/Guardian _____

Occupation _____

Employment status _____

Name and Address of Employer or Business _____

Post Code _____

Are you a Director or Proprietor of this Company or Business? YES/NO

If yes please state the proportion of Company or Business owned by you and or your spouse/partner

.....%

Full name of Mother/Stepmother/Guardian _____

Occupation _____

Employment status _____

Name and Address of Employer or Business _____

Post Code _____

Are you a Director or Proprietor of this Company or Business? YES/NO

If yes please state the proportion of Company or Business owned by you and or your spouse/partner

.....%

Child's present address_____

Post Code_____

Father/Stepfather/Guardian's

Telephone Numbers

Address if different from above:

Home_____

Business_____

Mobile_____

Email Address_____

Mother/Stepmothers/Guardian's

Telephone Numbers

Address if different from above:

Home_____

Business_____

Mobile_____

Email Address_____

INCOME

	Father	Father	Mother	Mother
	ACTUAL 2010/11	ESTIMATED 2011/12	ACTUAL 2010/11	ESTIMATED 2011/12
Gross Salary and other earnings (including all taxable benefits)				
Profits of business or profession				
Gross Pension Income				
Gross investment income from: 1. Building Societies/Banks 2. Dividends				
Gross income from property				
Social Security benefits - see below				
Working Families' Tax Credits				
Income Support				
Job Seekers' Allowance				
Disability Benefit				
Other including Child Benefit and Child Tax Credits (please specify)				
Separation or Maintenance Allowance				
Is there a Court Order/Separation Agreement? If yes, please state annual amount payable for school fees.	YES/NO £.....	YES/NO £.....	YES/NO £.....	YES/NO £.....
Any other income not included in above (e.g. letting or sub-letting of properties)				
Redundancy, employment separation or lump sum Payments				

OUTGOINGS

	Father	Father	Mother	Mother
	ACTUAL 2010/11	ESTIMATED 2011/12	ACTUAL 2010/11	ESTIMATED 2011/12
Tax payable on incomes declared above (including tax deducted at source)				
National insurance Contributions				
Pension Contributions				
Mortgage interest/rent on home				
Endowment mortgage insurance				
Any other interest payable (please specify)				
Council Tax payable on home				

CAPITAL ASSETS

	Father	Mother
Approximate market value of all investments		
1. Building Society/Bank Deposits	£.....	£.....
2. Equity investments, Government stocks	£.....	£.....
3. ISAs (also formally known as Tesas)	£.....	£.....
4. Other (please specify)	£.....	£.....
Approximate market value of principal residence		
Approximate market value of any other assets (please specify and include the market value of any insurance policies maturing in this tax year)		
Approximate market value of any other properties owned either at home or abroad including time share		

CAPITAL LIABILITIES

	Father	Mother
Mortgage outstanding on house Final payment date of mortgage (Please provide annual mortgage statement)		
Other liabilities (e.g. credit cards, personal loans etc. - please specify)		
SUB-TOTAL: TOTAL ASSETS TOTAL LIABILITIES		
NET ASSETS (total assets minus total liabilities)		

You should indicate below if there are any reasons why net assets cannot be converted or utilised to pay school fees or to fund fees.

Please submit the following items where appropriate, and tick the box to indicate those you are enclosing. All information relevant to your application **must** be submitted or your application will otherwise not be considered.

Employed	Father	Mother
December 2011 (or most recent) Pay Advice slip (s)		
Letter confirming any upcoming salary change		
Certificates of dividends received from your own company		
Unemployed		
Summary of Social Security Benefits received (this information must be provided by the benefits agency)		
Self Employed		
Full set of certified business Report and Accounts (including Balance Sheet) for the years 2010/11 and estimated for 2011/12		
Full details of personal drawing or salary payments from business (this should be verified by an appropriate third party, e.g. your accountant)		
Miscellaneous		
Working Families' Tax Credit letter of award		
Child Tax Credit letter of award		
Child Benefit letter of award		
Details of any pensions or other state benefits received		
P60(s) for any occupational pensions received		
Details of maintenance payments received		
Annual investment portfolio details and statements		
Details of any dividends received		
Bank & building society statements		
Certificate of interest for all bank or building society accounts		
Credit card statement(s)		
Personal or other loan statement(s)		
Full details of rental income received		
Details of any capital gains on the disposal of chargeable assets		
Annual mortgage statement		
Property valuation		
Property Contents insurance notice		
A copy of the 2010/11 tax calculation sent to you by HM Revenue & Customs		
Other (please specify)		

PAGE LEFT BLANK FOR ANY ADDITIONAL INFORMATION

NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Finance Office if further information or advice is required.

The College 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.

INCOME

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 current or latest financial year. Taxable benefits in kind with HMRC should also be shown (free or subsidised housing, meals, petrol, cars etc.) - at the amount for taxable purposes.

Profits from a business or profession - at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deduction should be made only in respect of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.

All other investment income (e.g. interest or National Savings Banks 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.

All social security benefits received should be declared and type of benefit specified.

Court Orders, Legal Separation Agreement 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 grant to be awarded. This is irrespective of whether or not the Order/agreement is being complied with. Where the whole amount of the fees are required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for financial assistance. 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.

Enter income from letting or sub-letting of property at the amount of the NET profit agreed with the HMRC;

OUTGOINGS

Enter Income tax and tax on unearned income SEPARATELY.

Enter annual superannuation contribution (if applicable) and payments to other Pension Schemes.

Enter capital as well as interest payment on a mortgage for the principal residence.

Only complete this if repayment is effected by means of a full Endowment Policy.

Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

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, 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.

In the case of second homes and/or other properties, these should be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

PARENTS'/APPLICANTS' CAPITAL LIABILITIES

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

ANY OTHER RELEVANT INFORMATION

Please enter any details which may affect the assessment of financial assistance, e.g. a significant change in income or outgoings for the coming year.

DECLARATION

After completion, both parents should sign the following declaration

I/We declare that to the best of my/our knowledge and belief, all the particulars here submitted are true and contain a full statement of my/our income from all sources during the periods shown.

I/we understand that the provision of false information may lead to my/our child being Disqualified from assistance under the bursaries scheme and the value of any bursary previously awarded will become repayable.

Please sign: Father/Stepfather/Guardian_____

Date_____

Mother/Stepmother/Guardian_____

Date_____

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

If divorced or separated you may be asked to provide further information.

THIS FORM MUST BE RETURNED BY NO LATER THAT 28th JANUARY 2012.

FAILURE TO MEET THE DEADLINE MAY RESULT IN THE APPLICATION NOT BEING CONSIDERED

PLEASE RETURN TO: RESOURCE MANAGER, HAMILTON COLLEGE.

