



ALTRINCHAM PREPARATORY SCHOOL
BURSARY APPLICATION FORM ACADEMIC YEAR 2023-24
September 2023

CONFIDENTIAL WHEN COMPLETED

This questionnaire is based on a template recommended by the Independent Schools' Bursars Association

Please ensure that you complete the form in full as we cannot accept incomplete forms. All applications will be reviewed by an independent source so please ensure that all the information is accurate.

1. SON'S DETAILS

Please provide details of the child applying to the school

Full name	
Date of Birth	
Year group of entry <i>e.g.</i> <i>Year 1</i>	
Current school	

Please provide the names of any relatives of the child who attend or have attended APS
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2. PARENTS/GUARDIANS

Please provide details of the parents/guardians who are submitting the application. Details must be those of the boy's legal parents/guardians and information must be provided for two persons. If the parents are separated or divorced both the mother and father are required to complete the application form.

	Father/Stepfather/Guardian	Mother/Stepmother/ Guardian
Full name		
Title		
Address		
Daytime telephone		
Mobile telephone		

	Father/Stepfather/Guardian	Mother/Stepmother/Guardian
Occupation status	Employed/self-employed/ retired/unemployed business owner <i>delete as applicable</i>	Employed/self-employed/ retired/unemployed business owner <i>delete as applicable</i>
Job title		
Name and address of employer/your business		
Are you a director or proprietor of this business?	Yes/No	Yes/No
If yes, when is your business year end?		
Your email address		

3. FATHER'S/STEPFATHER'S/GUARDIAN'S INCOME

Please enter your gross current earnings and expected income per year from all sources for 2023 and 2024.

	Actual figures for tax year ended April 2023	Estimated figures for tax year ending April 2024
Gross Salary and other emoluments		
Taxable benefits		
Bonus payments		
Gross profits of own business		
Gross pension		
Gross investment income from eg, building society/bank dividends, interest		
Dividends from own business or company		
Gross rental income from property		
Separation/maintenance allowance/child support. Please state if there is an amount payable for school fees		
Jobseekers allowance		
Income support		
Child benefit		
Child tax credit		
Working tax credit		
Council tax benefit / housing benefit		
Universal tax credit		
Other social security benefits		
Other income or gains not included above e.g. Trust or estate income, gains on sale of capital assets, maturity of life assurance policies, royalties etc.		
Total Income	£	£

4. FATHER'S/STEPFATHER'S/GUARDIAN'S EXPENDITURE

Please enter your expenditure per year for 2023 and 2024

	Actual figures for tax year ended April 2023	Estimated yearly figures for current tax year ending April 2024
Tax payable on total income (including tax deducted at source)		
National Insurance contributions		
Pension or superannuation contributions		
Mortgage interest (include capital repayment and interest)		
Any other interest payable e.g. overdrafts, credit cards, loans etc.		
Annual rent payable on main residence		
Total expenditure	£	£

5. MOTHER'S/STEPMOTHER'S/GUARDIAN'S INCOME

Please enter your gross current earnings and expected income per year from all sources for 2023 and 2024.

	Actual figures for tax year ended April 2023	Estimated figures for tax year ending April 2024
Gross Salary and other emoluments		
Taxable benefits		
Bonus payments		
Gross profits of own business		
Gross pension		
Gross investment income from eg, building society/bank dividends, interest		
Dividends from own business or company		
Gross rental income from property		
Separation/maintenance allowance/child support. Please state if there is an amount payable for school fees		
Jobseekers allowance		
Income support		
Child benefit		
Child tax credit		
Working tax credit		
Council tax benefit /housing benefit		
Universal tax credit		
Other social security benefits		
Other income or gains not included above e.g. Trust or estate income, gains on sale of capital assets, maturity of life assurance policies, royalties etc		
Total Income	£	£

6. MOTHER'S/STEPMOTHER'S/GUARDIAN'S EXPENDITURE

Please enter your expenditure per year for 2023 and 2024

	Actual figures for tax year ended April 2023	Estimated yearly figures for current tax year ending April 2024
Tax payable on total income (including tax deducted at source)		
National Insurance contributions		
Pension contributions		
Mortgage interest (include capital repayment and interest)		
Any other interest payable		
Annual rent payable on main residence		
Total expenditure	£	£

7. CAPITAL ASSETS

		Parent 1	Parent 2
a	Approximate market value of all investments		
	<ul style="list-style-type: none"> Building Society/Bank deposits/National Savings accounts 		
	<ul style="list-style-type: none"> Equity investments (shares, unit trusts), Corporate bonds and other securities and Government stocks 		
	<ul style="list-style-type: none"> ISAs 		
	<ul style="list-style-type: none"> Life assurance bonds and policies including endowments 		
b	Approximate market value of principal residence (freehold or leasehold)		
c	Approximate market value of other possessions including house contents, car, collections, paintings, jewellery etc		
d	Cash at banks or elsewhere (current accounts only)		
e	Approximate market value of any other assets (please specify and include the market value of any Insurance Policies maturing in this tax year or the last five years)		
f	Net worth/value of any businesses which you own or share		
g	Approximate market value of your interest in any other property, land or buildings either at home or abroad		
h	Redundancy or other termination payments		
i	Monies that are owed to you		
j	Other assets not listed e.g., share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future etc		

8. CAPITAL LIABILITIES

		Parent 1	Parent 2
<i>(Please give details of any capital charges against the assets declared in Section 7)</i>			
a	Mortgage Details		
	<ul style="list-style-type: none"> amount outstanding on principal residence 		
	<ul style="list-style-type: none"> a final payment date 		
b	Outstanding school fee payments or charges		
c	Other liabilities <i>(please specify)</i>		

9. NET ASSETS

	TOTAL ASSETS (7)		
	LIABILITIES (8)		
	NET ASSETS (7 - 8)		
<i>Please explain any reasons why net assets cannot be converted or utilised to pay school fees.</i>			

10. DEPENDENT CHILDREN (include the child to whom this application refers: if more than four children give details on a separate sheet).

Only include children who are unmarried and at school, university or another educational institution.

		1	2	3	4
a	Forename				
b	Date of Birth				
c	School or College				
d	Boarding or Day				
		£	£	£	£
e	Annual school or other educational fees <i>(excluding extras and supplemental charges)</i>				
f	Compulsory additional school charges				
g	Amount of fees shown in (e) covered by:				
	• Scholarships, Bursaries or other allowances given by school				
	• Annual sum arising from capital repayment scheme				
	• Services/Diplomatic/ Company Education Allowances (gross) <i>(state whether sum has been included in gross salary at 3 (a))</i>				
	• Annual sum arising from Educational Insurance Policies				
	• Assistance from any other sources e.g., Grandparents, trusts, charities, etc <i>(please specify)</i>				
h	• Annual income of child <i>(if any)</i>				
	• Capital Value of Trust				

11. OTHER DEPENDENTS (Please give details)

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

12. VERIFICATION OF INCOME

Please enclose documentary evidence in support the income figures – sections 3 and 5. Please tick those you are enclosing.

P60 and P11D		Copy of HMRC tax calculation issued under Self-Assessment
March Pay Advice		Confirmation of Schedule D self-employment income from an independent accountant
Annual Report & Accounts (including Balance Sheet) for the years 2022 & 2023		
Others (<i>please specify</i>)		e.g. copies of dividend vouchers, bank interest certificates
Court Orders and Legal Separation agreements		Covering the payment of school fees and child maintenance
Benefits received		Universal Credit, Social Security Benefit, Housing Benefit, Job Seekers' Allowance, Employment & Support Allowance, Income Support, Disability Living allowance, Incapacity Benefit, Child Benefit

13. HOME VISITS

The school **may** wish to visit your home address(es) to discuss your application for support. The school may use a third party to make this visit on behalf of the school. Both parents should please indicate whether you are happy to receive a visit from the school's representative.

	Parent 1	Parent 2
Name		
Delete as appropriate	Yes/No	Yes/No

All those who apply for financial support are asked to enquire if they are eligible for assistance from any other source, including family members, family friends, relatives, employers, charities, trusts, foundations etc.

Please indicate if you have taken any steps to obtain assistance from any third party.

14. DECLARATION

After having the attached notes, the following declaration should be signed by both parents (or see below):

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

We understand that if we are offered a bursary for our son and accept a place for him at the school, the following terms and conditions will apply as between ourselves and the School:

- a) our child's fees account with the School 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 must complete an annual declaration of our financial circumstances on the form sent to us by the School and supply all relevant supporting evidence by the return date indicated;

- c) we will report immediately any material change in the financial position declared;
- d) the Grant may be withdrawn or reduced if:
 - i. we act or our child acts in breach of the School's Terms and Conditions attached to the Acceptance Form for our son at the school or in breach of the terms of the bursary award;
 - ii. we have failed to return the annual declaration of our financial circumstances by the return date indicated;
 - iii. we have failed to produce any additional information required by the School to evidence our financial circumstances;
 - iv. in the opinion of the Headmaster, our child's attendance, progress, attitude or behaviour no longer merits the continuation of the award;
 - v. we are more than 28 days in arrears in respect of any amount due and owing to the School;
 - vi. there is a material change in our financial circumstances;
 - vii. the School's resources are insufficient to maintain the level of award.

e) **IMPORTANT** - the bursary will be withdrawn with immediate effect and the value of any amount of the bursary previously credited against our son's fee account will become repayable to the school forthwith as a debt if we/I have fraudulently, knowingly or carelessly provided false or misleading information in relation to the award of the bursary; and

f) the details and terms of a bursary award **must** be strictly confidential and not revealed to any other party. Failure to do so will result in the bursary being withdrawn.

g) as otherwise stated in the school's Terms and Conditions as amended from time to time.

Signatures:

Parent/Stepparent/Guardian 1

.....Date

Parent/Stepparent/Guardian 2

.....Date.....

[NB. Each person with parental responsibility for the boy is required to sign this form and, where the parents do not live together in the same household, should provide the requested information in respect of their own household's circumstances]

Completed forms should be returned to:

The Headmaster
Altrincham Preparatory School
Marlborough Road
Bowdon
WA14 2RR