



## Bursary Form

Confidential Statement of Financial Circumstances  
In support of an application for a Bursary for session \_\_\_\_\_

SECTION A Personal Details		For School Use Only
<b>(i) CHILD</b>		
(a)	Full Names	
(b)	Date of Birth	(c) Boy <input type="checkbox"/> Girl <input type="checkbox"/>
(d)	School Currently Attended	(e) Class Year
<b>(ii) PARENTS</b>		
	<b>Father/Guardian</b>	<b>Mother/Guardian</b>
(a)	Names	
(b)	Title	
(c)	Addresses	
(d)	Occupation	
(e)	Name of Employer	
(f)	Daytime Tel No.	
(g)	Email Address	
(h)	Your address for correspondence (if different from above)	
		Postcode
(i)	If only one parent please tick the appropriate box to explain why.	
	Divorced <input type="checkbox"/>	Seperated <input type="checkbox"/> Deceased <input type="checkbox"/>
	Other (explain)	
<b>(iii) AGENT (Please complete where an Agent handles details of income)</b>		
	Name of Agent	
	Address of Agent	
	Telephone Number	
	Please indicate if this Agent may be contacted direct YES <input type="checkbox"/> NO <input type="checkbox"/>	

## SECTION B Income

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### PARENTS' INCOME

Please complete the following showing income from all sources, before deduction of tax, for the most recent financial year. Enter amounts in whole pounds or NIL in all places where applicable. Parents must provide copies of documentary evidence for all income declared in this section.

Unemployed       Employed       Self-Employed

(i)	Earned Income	Father	
		Benefits in kind	
		Mother	
		Benefits in kind	
(ii)	Superannuation Contributions <b>if not included above</b>	Father	
		Mother	
(iii)	Additional Voluntary Contributions <b>if not included above</b>	Father	
		Mother	
(iv)	Gross Pensions, Widows Pension etc.		
(v)	Social Security Benefits		
(vi)	Property Income		
(vii)	Building Society Interest received		
(viii)	Other investment income GROSS		
(ix)	Dividends from employment in a public limited company		
(x)	Child Support, Seperation or Maintenance Allowance		
(xi)	Redundancy payments		
(xii)	Any other income not included above		
<b>TOTAL</b>			

### ESTIMATED INCOME

To be completed only by self-employed parents or others entering estimated, rather than actual, income figures above. Those entering estimated income figures, should state:

(i)	Period for which latest actual figures are available
(ii)	Latest actual figures for earned income £
(iii)	Date when next financial year figures are likely to be available

## SECTION C Outgoings

Parents must provide copies of documentary evidence for all expenditure declared in this section. (All figures should be in respect of the year indicated at Section B)

		Father £	Mother £
(i)	Tax payable on Incomes declared above (including tax deducted at source)		
(ii)	National Insurance Contributions		
(iii)	Superannuation Contributions		
(iv)	Mortgage interest (state interest only and not instalment of mortgage repaid)		
(v)	Endowment mortgage insurance		
(vi)	Any other interest payable (please specify)		
(vii)	Annual rent and/or Council Tax payable on home		

## SECTION D Capital Assets

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Parents must provide copies of documentary evidence for all assets declared in this section

		Father £	Mother £
(i)	Approximate market value of all investments (including stocks, shares, unit trusts, PEPs, TESSAs, Bank and Building Society Deposits)		
(ii)	Approximate market value of house		
(iii)	Cash at Banks or elsewhere (including 2 recent bank statements)		
(i)	Approximate market value of other assets (please specify and include the market value of any Insurance policies maturing in this tax year)		
(ii)	Approximate market value of any other Properties owned either at home or abroad		

## SECTION E Capital Liabilities

Please give details of any capital charges against the assets declared in Section D.

Parents must provide copies of documentary evidence for all liabilities declared in this section (eg mortgage statement, loans schedules etc)

		Father £	Mother £
(i)	Mortgage - amount outstanding on house		
(ii)	Other Liabilities		

## SECTION F Dependent Children

Include the child to whom this application refers:

If more than 3 children, please give details on a separate sheet.

		1	2	3
(i)	Forename			
(ii)	Date of Birth			
(iii)	Gender			
(iv)	School or College			
(v)	Annual School or other Educational fees			
(vi)	Scholarships, Bursaries or allowances given by School			
(vii)	Assistance from other sources e.g. Grandparents, trusts, settlements etc. (please specify)			
(viii)	Annual income of child (if any)			

**SECTION G Other Dependents**

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Please give details:

**SECTION H Any other relevant information**

(continue on separate sheet if necessary)

**SECTION I Alternative assistance**

(continue on separate sheet if necessary)

**SECTION J Ulick Montgomerie Bursary**

If you wish your child to be considered for the Ulick Montgomerie Bursary, please tick here and provide details of their special learning needs in the space below. Additional supporting documentation may be provided separately.

**SECTION J Declaration**

I/We declare that, to the best of my/our knowledge and belief, all the information given here is true and contains 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 prevented from receiving a bursary award.

Date	Signature	Father/Guardian
Date	Signature	Mother/Guardian

\*The completed form must be returned no later than

Please return to: Finance Manager, Wellington School  
 Carleton Turrets, Craigweil Road, Ayr, KA7 2XH  
 Telephone: 01292 269321 or 01292 272160

## Document Checklist

	P60s and most recent payslip(s)
	Accounts statements of earnings taken by self-employed and those operating their own businesses for last 3 years
	Social security benefit statements - Child Benefit, Working Tax Credit, Child Tax Credit, etc.
	Statements documenting level of Child Support, Separation or Maintenance Allowance, Supporting information for any other income listed in Section B
	Statements documenting level of Child Support, Separation or Maintenance Allowance, Supporting information for any other income listed in Section B
	Statements documenting level of Child Support, Separation or Maintenance Allowance, Supporting information for any other income listed in Section B
	P60 providing information on tax, NI and superannuation payments
	Council Tax statement
	Tenancy Agreement detailing annual rent figure
	Supporting information for any other outgoings listed in Section C
	Copies of two recent bank statements (for each bank account held)
	Supporting information for the market value of any other asset/investment/property listed in Section D
	Mortgage statement (detailed above) will also confirm mortgage outstanding on the house. Copies of key pages of any other liability/loan agreement (car loan, personal loan, lending drawn against home, etc.)
	Please provide supporting documentation for any income received by the child or assistance received from other sources, under Section F
	Additional supporting documentation required for Ulick Montgomerie Bursary application

**I confirm that I have included all relevant information to support my application. I understand that if I do not it will disqualify my application.**

Signed: \_\_\_\_\_