



TRURO SCHOOL

TRURO SCHOOL BURSARY SUPPORT APPLICATION

Thank you for your interest in the School's bursary programme. A core element of Truro School's ethos has always been, and remains, to attract girls and boys who can best benefit from what we have to offer regardless of their parents' ability to pay.

The Truro School Foundation assists us in our support of bursary applicants. However each year we receive more requests for bursaries than we can meet. We are working hard to increase the School's capacity to award bursaries, but resources are finite.

The Application Form enclosed, which you are about to complete, is necessarily searching, and we make no apologies for that. Before asking for bursary support, you will, we hope, have explored all alternative sources of funding within the wider family.

Please make full disclosure of all household income, assets and family support. We draw your attention to the Declaration, in which you will confirm that you have fully and accurately represented your financial position. Once completed this needs to be sent by email to bursaryapplications@truroschool.com in the first instance, where it will be processed and sent to the Fee Remission Committee for their consideration.

A Johnson, Head

K Topping, Chief Operating Officer

Included within the application:

| | |
|--|---------|
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BURSARY SUPPORT APPLICATION on behalf of:

Name of Child.....

Date of Birth

This application cannot be assessed without the required supporting documentation. **Please make sure 12 months of bank statements for all accounts are included in your supporting documentation.** Truro School is a member of the Methodist Independent Schools Group, registered office: 66 Lincoln's Inn Fields, London WC24 3LH. Charity Number 1142794 and Company Number 07649422.

ASSESSING YOUR APPLICATION – DATA PROTECTION & HOME VISIT CONSENT

HOME VISIT

The School **may** wish for its representative to visit you at your home address to discuss your application for support. Please let us know if there are any constraints that would make this difficult:

PRIVACY STATEMENT

Truro School collects and processes relevant personal data as part of its everyday operations and is obliged to process it in accordance with the Data Protection Act 1998. The School is the Data Controller of this data under the Act and is registered with the Information Commissioner’s Office. The School’s Data Protection Policy may be found on its website: www.truroschoo.com. Any queries about this Policy or how personal data is processed by the School should be referred to its Data Protection Officer.

The school is responsible for all information supplied and for making the final decision in respect of all bursary awards.

The School may appoint a professional company to provide assessment and home visit services. If the School makes an appointment for an external company to conduct the assessment this will be communicated to you in advance of the process commencing.

Please note that no application will be considered unless the process detailed above is followed and all people with parental responsibility for the child have signed below.

I / We have read the above and consent to my / our and the child’s / children’s information being processed in the manner described above:

Signed: **Signed:**

Date:

NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY APPLICATION FORM

Before completing the form, please read these notes carefully, and contact the Business Director if further information or advice is required. These notes refer to the corresponding paragraph on the Form. If for any reason you feel your financial circumstances need additional explanation, please feel free to include a covering letter alongside your completed application form.

The School 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.

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

Where relevant an indication of the documents required to support and evidence each answer is given alongside the relevant heading. It is important that all applications are supported by the documentation shown (and any other information that you think may be useful in assessing your application). You are encouraged to tick the relevant boxes to ensure the information has been included. Please send copies of documents unless you do require return of the originals. Failure to supply this may result in a delay in the assessment process.

SECTION 2 PARENTS/APPLICANTS

The School expects each parent/guardian with parental responsibility for the child to complete the application form. In cases where parents have divorced the School's expectation is that both parents will still complete and sign the application form, unless parental responsibility has been surrendered by a parent. Please include a copy of the divorce agreement if there are specific clauses relating to the provision of school fees. Separate forms can be provided to each parent should they not wish to share their financial details with each other and the School will collate the information.

Parents/applicants are defined as:

- The natural father and mother of the child where they live together (whether or not they are married to each other) and 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 (or any earlier enactment) 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
- Where a pupil either has no parents as defined above or the school is satisfied that no such parents can be found, and he 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.

SECTION 2.3 OTHER ADULTS MEMBERS IN HOUSEHOLD

Please give details of all other adults resident in the family home other than the mother/step mother and father/step father whose details are given in Section 2.1. The figures to be inserted here for "Financial contribution to household" and "Financial contribution to the Child's education" refer to the current academic year.

SECTION 2.4 DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her current school rate. Enter in other columns any other of your children who are at a school, university or other educational institution which attracts a grant.

The figures to be inserted here refer to the current academic year.

Third party contributions

Where third parties contribute towards the maintenance and/or education of the Child, please enter details here.

- **Employer contributions**

Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in similar occupations or whose employer's contribute should include relevant details.

- **Insurance Policies for School Fees**

If any insurance or investment policy for the payment of School fees exists, then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees, then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

The Child's own income

Where the child has any unearned income, e.g. interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. Do not include any income from part time employment or student grants.

SECTION 2.5 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 age, address, condition, etc.

SECTION 3 INCOME

Please enter your earnings and income from all sources. Income and earnings should normally be given for the most recent complete tax year immediately preceding your application. If income details are given that relate to another period, please give details of the period and the reasons why this has been adopted.

If you expect that your income will be significantly different in the current year, please give details in the space provided at the end of the Section. Please give details of all significant changes whether increases or decreases in income.

In order to be fair to everyone, we have a duty to ensure that all bursary awards are well focused and so, as well as current earnings, other factors will be considered in determining the necessary level of bursary. These will include:

The ability to improve the financial position or earning power of the family (where there are two partners both would be expected to be employed unless one is prevented from doing so through incapacity, the need to care for children under school age or other dependants or the requirements of their partner's work). If this is not the case, a national average salary for the area will be included before the assessment is made.

Opportunities to release any capital (significant capital savings and investments would be expected to be used for the payment of school fees as would significant equity value in a house).

Wages and salary

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 agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc.) – at the amount agreed for taxable purposes.

Include free benefits in kind agreed by HMRC as not subject to tax, e.g. representative occupation of house, free meals.

Bonuses – please give details of any variable element in your remuneration including the amount included in salaries and wages disclosed above and the estimated amount for the current year.

Income from self-employment and partnerships

Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances). Copies of the last two sets of accounts should be included.

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.

Pensions and State benefits

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

Interest and investment income

Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; include royalties and all other sources including entertainment and travel allowances etc.

Dividends received or receivable from family and other companies in which you or your spouse or partner have an interest should be disclosed in the previous section "Income from related companies".

Other income

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 grant to be awarded. This is irrespective of whether or not the order or agreement is being complied with. 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 any allowances and/or monies you or your spouse/partner receive from grandparents and/or other family members.

Enter any income you or your spouse/partner receive from a Trust or Trusts. The Child's income from Trust(s) should not be included here; rather it should be included in Section 6.

SECTION 4 OUTGOINGS

If you expect that your outgoings will be significantly different in the current year, please give details in the space provided at the end of the Section. Please give details of all significant changes whether increases or decreases in your outgoings.

Tax and National Insurance

Disclose the tax and NI deductions that relate to the income in the previous Section, i.e. both the income and deductions should relate to the same periods. Enter the Income Tax and tax on unearned income SEPARATELY.

Pension costs

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

Please distinguish between pension contributions made gross (i.e. contributions to occupational schemes deducted by your employer from your pre-tax pay and tax relief for which is given directly through your payroll) and those made net (i.e. either made direct to your pension provider or deducted from your pay after tax).

Accommodation costs

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

Give details of premiums paid to endowment policies only if repayment is effected by means of these endowment policies.

Other expenditure

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

SECTION 5.1 PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School takes account of your capital assets. All values should be included at their market value or a best estimate of their market value at the date of your application. Capital assets include the following:

- Cash and deposits - 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.

- If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should normally be valued at the relevant proportion of the net value of the company.
- The current market value of your principal residence. The current market value should be estimated where a current valuation is unavailable.
- In the case of second homes and/or other properties, these should also be included at their estimated current market value.

SECTION 5.2 PARENTS'/APPLICANTS' CAPITAL LIABILITIES

Details of mortgages on principal residence or mortgages on other property, land or holdings together with other liabilities should be provided together with details of the lender in each case. If you have more than one property, indicate to which property each loan relates.

Give details of bank overdrafts any other significant liabilities currently outstanding.

SECTION 6 ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance and to focus the School's resources which are inevitably limited, on those who could benefit most from them, all those applying for a bursary are asked to consider beforehand whether they can obtain some or all the assistance they need from any other source. Many of the School's pupils, for example, receive support and help from grandparents and other family members.

Trusts

Enter any income the Child receives from a Trust or Trusts. Where a Trust or Trusts has been established in favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given. The capital value of the Trust(s) should also be given together with details of when and how the capital of the Trust(s) can be accessed. If the capital cannot be accessed at present, the reasons why not should be clearly stated.

Confirm whether or not you receive or expect to receive any assistance in respect of fees from grandparents and/or godparents and/or any other family members, and enter the amount of any such assistance.

Confirm whether or not you receive or expect to receive any assistance in respect of fees from any other source, including your employer(s), other charities and third-party trusts etc., and enter the amount of any such assistance.

SECTION 7 SELF ASSESSMENT

Please enter, on page 23, an estimate of the value of school fees you feel is affordable and sustainable given your current financial circumstances.

SECTION 8 ANY OTHER RELEVANT INFORMATION

Please enter, on page 24 or on a separate sheet if necessary, any details which you feel may affect this application, e.g. a significant change in income or outgoings for the coming year.

CONFIDENTIALITY

The School respects the confidentiality of bursary awards made to families and recipients are expected to do likewise.

QUERIES

Queries in the first instance should be directed to the finance team: bursaryapplications@truoschool.com

Application for Assistance with School Fees

For Office Use Only

For the School Year 2024/25

New Bursary Applicants

Declaration of Income and Assets

(All Bursaries are awarded at the Absolute Discretion of the School)

Please Do Not Enclose Original Documents - Photocopies Are Acceptable

All supporting evidence should be shared electronically, either scanned in or sent as PDFs.

Truro School, Trennick Lane, Truro, Cornwall TR1 1TH

Please read the Notes for Guidance on pages 4 to 7 before completing this form and contact the Bursar if further information or advice is required.

All financial values should be shown in Sterling to the nearest Pound with "estimate" or "nil" where applicable. Income and expenditure should be shown as annual values unless otherwise indicated.

| 1. THE CHILD (i.e. the child in respect of whom this bursary application is made) | | |
|---|----------------|----------------|
| Full name | Forename(s): | Surname: |
| Date of birth | | |
| For pupils currently at the School: | | |
| Term and year of entry | | |
| For pupils not yet at the School: | | |
| Proposed term and year of entry | | |
| Current school | | |
| Are you currently receiving a bursary or other fee support from that school? <i>If so, please give details</i> | | |
| 2.1 PARENT'S CONTACT DETAILS (see notes on page 19) | | |
| | Parent/Carer 1 | Parent/Carer 2 |
| Name | | |
| Style or title | | |
| Address | | |
| Post code | | |
| Daytime telephone number | | |
| Evening telephone number | | |
| Mobile number | | |
| E-mail address | | |

| 2.2 PARENTS' OCCUPATIONS | | |
|---|---|---|
| | Parent/Carer 1 | Parent/Carer 2 |
| Employment status | Employed / Self-Employed / Unemployed / Retired / Homemaker / Other (please circle) | Employed / Self-Employed / Unemployed / Retired / Homemaker / Other (please circle) |
| Occupation Please make the description as specific as possible e.g. by avoiding generic titles such as 'self-employed' or 'director'. | | |
| If you are employed: | | |
| Employer's name, address and telephone number | | |
| Are you a director or equivalent of this company? | Yes / No | Yes / No |
| Are you a shareholder or proprietor of this company? If 'YES' state proportion of company you and/or your spouse/partner own | Yes / No % | Yes / No % |
| If you are self-employed: | | |
| Name and type of business (e.g. sole-trader or partnership), address and telephone number | | |
| If you are a partner, state your share of partnership income and capital. | % | % |

| 2.3 OTHER ADULT FAMILY MEMBERS IN HOUSEHOLD (see notes on page 17) (eg. grandparents, siblings over 21, and aunts and uncles etc. If more than two, please give details on a separate sheet) | | |
|--|-----------------|-----------------|
| | Person 1 | Person 2 |
| Name | | |
| Relationship to the Child | | |
| Financial contribution to household | | |
| Financial contribution to the Child's education | | |

2.4 DEPENDENT CHILDREN (see notes on pages 19 and 20)

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

| | 1 (The Child) | 2 | 3 | 4 |
|--|------------------|----------|----------|----------|
| Full name | | | | |
| Date of birth | | | | |
| Current School, College or University | | | | |
| Boarding or Day | | | | |
| | £ | £ | £ | £ |
| Annual school or other educational fees (excluding extras and disbursements) | | | | |
| Other compulsory school charges | | | | |
| Have you or are you about to apply for a bursary from this Child's school? If yes, amount of scholarships, bursaries or other allowances given by school | Yes / No | Yes / No | Yes / No | Yes / No |
| Amount of school fees covered by: | | | | |
| <ul style="list-style-type: none"> Annual sum arising from capital repayment scheme Services/Diplomatic/Company Education Allowances (gross) Annual sum arising from Educational Insurance Policies | | | | |
| Assistance from any other sources: | | | | |
| <ul style="list-style-type: none"> Grandparents Trusts Charities Local Authorities Other (please specify) | | | | |
| Annual income of the Child (if any) | | | | |
| If there is a Trust for the benefit of one or more of these children please state: <ul style="list-style-type: none"> annual income from the trust capital value of trust when and how the capital of the trust can be accessed | | | | |
| The details requested with regard to fees payable and grants on behalf of your children are for information only and will not normally be taken into account in the assessment of the level of grant awarded. | | | | |

2.5 OTHER DEPENDENTS (see notes on page 20)

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 age, address, condition, etc.

3. INCOME (see notes on pages 21 and 22)

Please enter below your earnings and income from all sources for the most recent complete tax year immediately preceding the date of your application. Where available, please enclose copies of your tax returns & HMRC's statements for the relevant years.

| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
|---|-------------------------|-------------------------|--|--------------------------|
| Tax year for which this information is provided | Year ended 5 April 2023 | Year ended 5 April 2023 | | |
| Wages and salaries | | | | |
| Gross salary, wages and other similar earnings (before pension) (including all fees, commissions, bonuses and taxable expenses etc.) | | | P60 Tax return 3 most recent pay slips | <input type="checkbox"/> |
| Taxable benefits in kind | | | P11d | <input type="checkbox"/> |
| Benefits in kind provided free by reason of employment or self-employment not already included above. | | | Appropriate evidence | <input type="checkbox"/> |
| Does the remuneration stated above contain any significant variable element e.g. a bonus? If so, please specify and indicate the level you expect in the current year and how that differs from the previous year. | | | Appropriate evidence | <input type="checkbox"/> |
| Income from related companies | | | | |
| If you are a director or shareholder (>5%) in a company or companies: | | | | |
| Name of company | | | Copies of company's accounts for the two most recent years | <input type="checkbox"/> |
| Date of year end | | | | |
| Your gross earnings from the company (if not shown under "Wages and Salaries" above) | | | | |
| The dividends you have taken from the company for the year | | | | |
| The company's retained profit for the year after tax and dividends | | | | |
| Net assets of the company at its most recent year end | | | | |

| 3. INCOME (continued) | | | | |
|--|-----------------------|-----------------------|--|--------------------------|
| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
| Income from self-employment and partnerships | | | | |
| Profits of businesses as agreed for tax accounting purposes for last two periods: | | | | |
| Most recent financial year: <ul style="list-style-type: none"> Date of year end Profit for year before tax Previous financial year: <ul style="list-style-type: none"> Date of year end Profit for year before tax | | | Copies of accounts and tax returns for the two most recent tax years | <input type="checkbox"/> |
| Pensions and state benefits | | | | |
| Gross pension income <i>(including Widow's and State and employer's Pensions etc.)</i> | | | Notification from pension provider | <input type="checkbox"/> |
| Child Benefit | | | Award letter | <input type="checkbox"/> |
| Other Social security benefits <i>(including Working and Child Tax Credits, Universal Credit, Income Support and Jobseekers Allowance, Employment Support Allowance, Disability Living Allowance and Personal Independence Payments, Carer's Allowance, etc.)</i> <i>(Please give details)</i> | | | Notification from Social Security Agency | <input type="checkbox"/> |
| Interest and investment income | | | | |
| Gross dividends and interest received from investments | | | Tax Certificate | <input type="checkbox"/> |
| Gross interest received from cash balances including bank and building society accounts and deposits | | | Tax Certificate | <input type="checkbox"/> |
| Rental income from property (including income from lodgers). Please show the following separately: <ul style="list-style-type: none"> Gross rental income Deductions for interest payable Other deductions claimed Net rental income | | | Tax Return and/or other income statement | <input type="checkbox"/> |
| Any other investment income <i>(Please give details)</i> | | | Appropriate evidence | <input type="checkbox"/> |

| 3. INCOME (continued) | | | | |
|--|-----------------------|-----------------------|----------------------|--------------------------|
| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
| Other income | | | | |
| Redundancy or other termination payments received in year | | | Appropriate evidence | <input type="checkbox"/> |
| Separation or Maintenance Allowances receivable Is there a Court Order or Separation Agreement? If yes, please state annual amount payable for school fees. | Yes / No | Yes / No | Copy of Court Order | <input type="checkbox"/> |
| Allowances and other monies received from your parents and/or grandparents and/or other family members | | | Appropriate evidence | <input type="checkbox"/> |
| Income from trusts or estates | | | Tax return | <input type="checkbox"/> |
| Any other income or gains not included above, e.g. <ul style="list-style-type: none"> Gains on sale of capital assets Surrenders of life assurance policies etc. <i>(Please give details)</i> | | | Appropriate evidence | <input type="checkbox"/> |
| Please give details of any significant changes to your income (whether increases and decreases) that you expect in the current year | | | | |
| | | | | |
| Have you received or are you due to receive soon any redundancy, retirement, ex-gratia or similar payments? Please give details including expected date of receipt | | | | |
| | | | | |

| 4. OUTGOINGS (see notes on page 21) | | | | |
|--|-----------------------|-----------------------|---|--------------------------------|
| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
| Tax and National Insurance | | | | |
| Tax payable on income declared above <i>(including tax deducted at source)</i> | | | P60 Tax Return | <input type="checkbox"/> |
| National Insurance contributions on income declared above <i>(including contributions deducted at source)</i> | | | P60 Tax Return | <input type="checkbox"/> |
| Pensions contributions | | | | |
| Pension or superannuation contributions Are these made before or after tax | | | Pay slips or tax returns or certificate from pension provider | <input type="checkbox"/> |
| If you are contributing to a workplace scheme, what is the <u>minimum</u> contribution rate? | % | % | | |
| Accommodation costs | | | | |
| Payments towards a mortgage and/or loan on your main home <ul style="list-style-type: none"> • Interest • Capital repayments • Endowment premiums associated with this mortgage • Any other payments | | | Annual mortgage/loan statement | <input type="checkbox"/> |
| Annual rent payable on your main home | | | Copy of Terms of Agreement | <input type="checkbox"/> |
| Other expenditure | | | | |
| Payments towards a mortgage and/or loan on other properties <ul style="list-style-type: none"> • Interest • Capital repayments • Endowment premiums associated with this mortgage • Any other payments | | | Annual mortgage/loan statement | <input type="checkbox"/> |
| Bank or other interest payable e.g. over-drafts, credit cards, loans etc. <i>(Please give details of the interest/charges – not the full payment amount)</i> | | | Copy of agreement | <input type="checkbox"/> |

| 4. OUTGOINGS (continued) | | | | |
|---|-----------------------|-----------------------|---|--------------------------------|
| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
| Separation or Maintenance payments payable | | | Copy of relevant part of order/ agreement | <input type="checkbox"/> |
| Other expenditure: Please provide any other expenditure that is not clear in your bank statements. | | | | |
| Do you have any other special outgoings <i>(please give details)</i> | | | Appropriate evidence | <input type="checkbox"/> |

| 4. OUTGOINGS (continued) |
|---|
| Please give details of any significant changes to your outgoings (whether increases and decreases) that you expect in the current year: |
| |

| 5. CAPITAL ASSETS and LIABILITIES (see notes on pages 21 and 22) Please enter below your current assets and liabilities at the date of your application | | | | |
|--|----------------|----------------|---|--------------------------|
| 5.1 ASSETS to be shown at market value or a close estimate of market value | | | | |
| | Parent/Carer 1 | Parent/Carer 2 | Documents required | Please tick if enclosed |
| Your main home and its contents | | | | |
| Value of your main home | | | Recent valuation | <input type="checkbox"/> |
| How many bedrooms does it have? | | | | |
| What % of its equity do you hold? <i>Please ignore any outstanding mortgage etc.</i> | % | % | | |
| In which year did you buy it? | | | | |
| What was the purchase price at that time? | | | | |
| Your car(s) | | | | |
| <ul style="list-style-type: none"> • How many cars do you have? • Make(s) and model(s) • Year(s) of registration • Registration number(s) | | | | |
| Your other possessions including house contents, collections, paintings, jewellery etc. | | | | |
| Please give details of any item or collections of items with a value in excess of £25,000 | | | Valuation or other appropriate evidence | <input type="checkbox"/> |
| Cash, investments and other assets | | | | |
| Cash and bank accounts and deposits (including all savings accounts with banks, building societies and National Savings etc.) <i>Please include holdings in cash ISAs and NISAs</i> | | | Recent valuations | <input type="checkbox"/> |
| Stock and shares (including shares, unit trusts, corporate bonds and Government stocks) <i>Please include holdings in PEPs, ISAs, NISAs, etc.</i> | | | Recent valuations | <input type="checkbox"/> |
| Life assurance bonds and policies including endowments | | | Recent valuations | <input type="checkbox"/> |

5.1 ASSETS (continued)

| | Parent/Carer 1 | Parent/Carer 2 | Documents required | Please tick if enclosed |
|---|----------------|----------------|--|--------------------------|
| <p>Net worth/value of any businesses or unlisted companies in which you own or have an interest (<i>see notes</i>)</p> <p>What percentage of the equity do you own?</p> | | | Copies of company's accounts for the two most recent years | <input type="checkbox"/> |
| <p>Second home(s)</p> <ul style="list-style-type: none"> • Full address incl. postcode • Current value • In which year did you buy it? • What was the purchase price at that time? | | | Recent valuation(s) | <input type="checkbox"/> |
| <p>Buy-to-let or Holiday properties (<i>show each separately</i>)</p> <ul style="list-style-type: none"> • Full address incl. postcode • Current value • In which year did you buy it? • What was the purchase price at that time? | | | Recent valuation(s) | <input type="checkbox"/> |
| Any other interest in property, land or buildings at home or abroad | | | Recent valuation(s) | <input type="checkbox"/> |
| Monies that are owed to you | | | Statement | <input type="checkbox"/> |
| <p>Other assets not listed e.g.</p> <ul style="list-style-type: none"> • share options • trust interests/assets held on your behalf by a third party • assets likely to be received in the foreseeable future • any insurance policies maturing in the current tax year etc. • Pension fund (if over 55) | | | Appropriate evidence | <input type="checkbox"/> |
| Date this information is provided | | | | |

Please explain any reasons why net assets cannot be converted or utilised to pay school fees

Please give details of any significant changes you expect to your assets and liabilities (whether increases and decreases) that you expect to occur in the current year

5.2 LIABILITIES (see notes on page 22)

Please give details of any capital charges against the assets declared in Section 5.1

| | Parent/Carer 1 | Parent/Carer 2 | Documents Required | Please tick if enclosed |
|--|-------------------------------|----------------|----------------------|--------------------------|
| Mortgage(s) outstanding on your main home | | | | |
| First mortgage | | | | |
| <ul style="list-style-type: none"> Amount outstanding Type of mortgage (repayments, interest only endowment, offset, other) Final payment date | | | Mortgage statement | <input type="checkbox"/> |
| Second mortgage | | | | |
| <ul style="list-style-type: none"> Amount outstanding Type of mortgage (repayments, interest only endowment, offset, other) Final payment date | | | Mortgage statement | <input type="checkbox"/> |
| Mortgage(s) outstanding on second home and/or other property, land or buildings either at home or abroad | | | | |
| <ul style="list-style-type: none"> Amount outstanding Type of mortgage (repayments, interest only endowment, offset, other) Final payment date Use of property | | | Mortgage statement | <input type="checkbox"/> |
| Other liabilities | | | | |
| Bank overdraft | | | Bank statement(s) | <input type="checkbox"/> |
| Other loans | | | Bank statement(s) | <input type="checkbox"/> |
| Credit cards (including arrears, school fee arrears, debt management) | | | | |
| Other liabilities <i>(please specify)</i> | | | Appropriate evidence | <input type="checkbox"/> |
| 5.3 NET ASSETS | | | | |
| | ASSETS (5.1) | | | |
| | LIABILITIES (5.2) | | | |
| | NET ASSETS (5.1 – 5.2) | | | |

6. ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance and to focus the limited resources available to those who could benefit most from it, all those applying for a Bursary from the School are asked to consider beforehand whether they can obtain some or all of the assistance they need from any other source.

| | | Documents Required | Please tick if enclosed |
|---|--|---------------------------------|--------------------------|
| Does the Child have any income of his/her own? If so, what is his annual income? | Yes / No | | |
| Does the Child currently benefit or can he/she in future benefit from any family or other trusts? If so, <ul style="list-style-type: none"> • what is the annual income? • what is the capital value of the trust(s)? ▪ when will the capital devolve? • is there any reason why this capital could not be used to assist with school fees? <i>If so, please explain.</i> | Yes / No | Trust Deed and recent valuation | <input type="checkbox"/> |
| Do other family members currently assist with the costs of the Child's maintenance and/or education or are they in a position to do so in future? | | | |
| <ul style="list-style-type: none"> • The Child's grandparents or great-grandparents? • The Child's Godparents? • The Child's aunts and uncles ▪ Other relations <i>If you have answered "Yes" to any of the above, please provide details on the next page.</i> | Yes / No Yes / No Yes / No Yes / No | Appropriate evidence | <input type="checkbox"/> |
| Do any other parties contribute towards the Child's maintenance and/or school fees? | | | |
| <ul style="list-style-type: none"> • Employer(s) • Charities and external trusts • Local authorities • Any other party <i>If you have answered "Yes" to any of the above, please provide details on the next page.</i> | Yes / No Yes / No Yes / No Yes / No | Appropriate evidence | <input type="checkbox"/> |
| Have you applied to trusts or foundations for a grant? If so, to which and with what result? | | | |

6. ASSISTANCE FROM OTHER SOURCES (continued)

The School is committed to providing bursaries to allow those who otherwise would not be able attend the School to do so. It is working hard to increase its capacity to award bursaries and does everything in its power to direct such funds as are available to those who most needed support.

The School expects that parents, for their part, will only ask for bursary support after exploring all alternative sources of funding. Please explain below what steps you have taken to this end and with what result.

7. SELF ASSESSMENT

The purpose of this extensive questionnaire is to allow the School's governors to assess how best to apply funds available for bursary support, which are inevitably limited. Please show here your assessment of the level of fees you could sustain during your child's duration at the School.

8. OTHER RELEVANT INFORMATION

Please give any additional information you consider relevant in support of your application (e.g. any specific assistance required, sacrifices you have made or will be making in order to contribute to school fees etc.)

DECLARATION

*delete as applicable

After reading the attached notes and completing the application form the following declaration should be signed by both Parents/Applicants:

We/I* have read the notes and have made a complete declaration of our/my* income and assets.

We/I* understand that if we/I* are/am* offered a Bursary for our/my* child and accept a place for him/her* at school:

- a) Our/my* child's fees account with Truro School will be credited termly with the amount of the Bursary.
- b) We/I* must complete a declaration of our/my* financial circumstances on the form sent to me/us* by Truro School and supply all relevant supporting evidence by the return date indicated at any time in the future it is required during the course of the pupil's education. We/I* also agree to provide to the School any further information as requested, in connection with this application.
- c) The Bursary may be withdrawn and past payment reclaimed if:
 - There is a breach of the Terms and Conditions attached to the acceptance of a place for our/my* child at the School.
 - We/I* have knowingly and/or recklessly provided false information.
 - We/I* have failed to return the annual declaration of our/my* financial circumstances by the return date indicated.
 - We/I* have failed to produce any additional information required by the School to evidence our/my* financial circumstances.
 - There is, in the view of the Headmaster, either unsatisfactory work or conduct.
- d) If our/my* child is withdrawn without giving the requisite notice under the Terms and Conditions, one full terms' fees will be due.
- e) The school may wish to visit your home address to discuss your application for support. Please indicate whether you are happy to receive a visit from the school's representative. Yes / No If this is not possible, please give reasons.
- f) We/I* understand that the award of a Bursary for this year places no obligation on the School to continue the support in subsequent years, or at the same level.
- g) I confirm that I have attached all documents outlined in Paragraphs 8 and 9 of the Notes for Guidance
- h) The information on this form is used solely for the processing of bursary applications. It is shared only amongst the small number of staff involved in the application process (The Finance Office, The Bursar, Head and Head of Admissions) and is only kept for as long as this year's bursary application process is running, including appeals. Your application form will be returned to you, or securely destroyed within 24 months of receipt of the application. We may share your information with a UK based third party for checking and processing. Your rights in regard to this information are included in our privacy notice, which can be found on our website at www.truroschoo.com/truro-senior-school/senior-school-policies/. If you have any questions regarding the bursary process, please contact bursaryapplications@truroschoo.com.

| Signature | |
|-----------------|------|
| Parent/Carer 1* | Date |
| Parent/Carer 2* | Date |

If only one parent signs the above declaration, please state reason as follows:

Divorced / Separated / Widowed / Other* (please delete as necessary)

CHECKLIST

- Have all parties with parental responsibility signed and completed pages 2 and 3?
- Has all supporting documentation been provided? Where appropriate this should include, but is not limited to:
 - Tax return
 - P60
 - 3 most recent payslips
 - P11d
 - Bank statements for the last twelve months
 - Most recent mortgage statement for first and any subsequent properties
 - Social security letter
 - Company accounts
 - Recent asset valuations
- Have all text boxes been completed?
- Has the self assessment text box (section 7) been completed?
- Covering letter if required?

Failure to adequately complete the form and/or omission of appropriate documentation may cause delays in the assessment of your application.

Please send your completed form and the necessary supporting documentation to bursaryapplications@truroschool.com