



ESMS

*A unique family of
independent schools
for boys and girls*

MEANS-TESTED BURSARIES

APPLICATION FOR FINANCIAL ASSISTANCE SESSION 2019/2020

NAME OF PUPIL(S):

YEAR GROUP(S) IN SESSION 2019/2020:

PRESENT SCHOOL(S):

Information entered on this form will be used by ESMS Governing Council and its delegated employees and appointed auditors only, and will be held and used in strict accordance with the provisions of the General Data Protection Regulation (DPA 2018).

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APPLICATION FOR FINANCIAL ASSISTANCE

CRITERIA - SESSION 2019/2020

We offer means-tested bursaries worth up to 100% of the tuition fee from Primary 7 onwards to enable children to study at our schools who would not otherwise be in a position to do so. The value of individual bursaries will be based on a sliding scale to be determined by the Governing Council. The offer of bursaries is entirely at the discretion of the Governing Council and will be dependent upon both the level of joint income of the parent(s) and the value of the net assets of the parent(s).

Income

Parent(s) should only apply if they meet the following criteria with regard to income:

- Parent(s) applying for a bursary for one child - joint income should **not** normally exceed £60,250.
- Parent(s) applying for a bursary for two children - joint income should **not** normally exceed £72,000.
- Parent(s) applying for a bursary for three or more children – should contact the Bursar in the first instance.

Net Assets

Parent(s) must also be willing to declare details of net assets. Net assets will be defined as capital assets less capital liabilities.

APPLICATIONS

This form should be completed **in full** and returned to:

Finance Department
The Mary Erskine School
Ravelston
EDINBURGH
EH4 3NT

****BY NOT LATER THAN**

For information, contact: Jonathan Molloy
Bursar
0131 347 5751
bursar@esms.org.uk

Hazel Colligan/Claire Nolan
Fees Administrators
0131 347 5757
fees@esms.org.uk

CONFIDENTIAL STATEMENT OF FINANCIAL CIRCUMSTANCES

I. CHILD/CHILDREN

| | | |
|-----|---|--|
| (a) | Full Name(s): | |
| (b) | Date(s) of Birth: | |
| (c) | Term/Year of Entry (if not yet enrolled) | |

2. PARENTS/APPLICANTS (See Note 1 – please read carefully before completing this form)

| | | <i>Father/Stepfather/Guardian</i> | <i>Mother/Stepmother/Guardian</i> |
|-----|---|--|--|
| (a) | Name | | |
| (b) | Title (Mr, Mrs etc.) | | |
| (c) | Address | | |
| (d) | Occupation | | |
| (e) | Employment status (employed, self-employed, etc.) | | |
| (f) | Name & Address of Employer or Business | | |
| (g) | Are you a Director or Proprietor of this Company or Business? | YES/NO (If "YES" state proportion of Company or Business that you own) % | YES/NO (If "YES" state proportion of Company or Business that you own) % |
| (h) | Daytime Tel No | | |
| | Evening Tel No | | |
| | Mobile Tel No | | |
| | E-mail address | | |

3. DEPENDENT CHILDREN (See Note 2)

Please include the child or children to whom this application refers in the table below, together with any other dependent children; if more than 4 children, give details on a separate sheet. The details requested with regard to the fees payable and allowances received on behalf of your other children are for information only and will not normally be taken into account in the assessment of the level of bursary awarded. However, the number of dependent children is taken into account so it is important that this section contains the details of any other dependent children.

| | | 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 and charges (current academic year) | | | | |
| (f) | Amount of fees shown in (e) covered by: | | | | |
| | i) Scholarships, bursaries or allowances given by the school or college | £..... | £..... | £..... | £..... |
| | ii) Educational insurance policies | £..... | £..... | £..... | £..... |
| | iii) Assistance from any other sources e.g. Grandparents, trusts, charities etc. (please specify) | £..... | £..... | £..... | £..... |

4. OTHER DEPENDENTS

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

5. INCOME (See Note 3)

Please enter below your earnings and other income from all sources for tax year 2017/2018 and your estimated earnings and other expected income for the year to 5th April 2019

| | | Father/Stepfather/Guardian | | Mother/Stepmother/Guardian | |
|-----|--|---|------------------------|-----------------------------------|------------------------|
| | | ACTUAL 2017/2018 | ESTIMATED 2018/2019 | ACTUAL 2017/2018 | ESTIMATED 2018/2019 |
| (a) | Gross Salary and other similar earnings | | | | |
| (b) | Profits of business, farm, estate or profession | | | | |
| (c) | Gross pension, widow's pension etc. | | | | |
| (d) | Gross investment income & interest from: i) Savings Accounts ii) Dividends | | | | |
| (e) | Net income from property | | | | |
| (f) | Social Security benefits: i) Child Benefit ii) Child Tax Credit iii) Working Tax Credit iv) Universal Credit v) Income Support vi) Job Seeker's Allowance vii) Disability Living Allowance viii) Carer's Allowance ix) Other (please specify) | | | | |
| (g) | Separation or Maintenance Allowance | | | | |
| (h) | Is there a Court Order or Separation Agreement? | YES/NO | YES/NO | YES/NO | YES/NO |
| | | If yes, please state annual amount payable for school fees. | | | |
| | | £..... | £..... | £..... | £..... |
| (i) | Redundancy, employment separation or lump sum Payments | | | | |
| (j) | Any other income not included in (a) to (i) above (please specify) | | | | |

6. CAPITAL ASSETS (See Note 4)

| | | Father/Stepfather/Guardian | Mother/Stepmother/Guardian |
|-----|---|-----------------------------------|-----------------------------------|
| (a) | Cash at banks or elsewhere (current accounts only) | | |
| (b) | Approximate market value of main home | | |
| (c) | Approximate market value of all investments | | |
| | i) Building Society/Bank Deposits | £..... | £..... |
| | ii) Equity Investments, Government stocks | £..... | £..... |
| | iii) Cash/Share ISAs | £..... | £..... |
| | iv) Other (please specify) | £..... | £..... |
| (d) | Approximate market value of any other assets (including Insurance Policies maturing in this tax year or in the last five years) | | |
| (e) | Net worth/value of any businesses which you own or share | | |
| (f) | Approximate market value of any other properties owned either at home or abroad | | |

7. CAPITAL LIABILITIES

| | | Father/Stepfather/Guardian | Mother/Stepmother/Guardian |
|-----|---|-----------------------------------|-----------------------------------|
| (a) | Mortgage | | |
| | i) Amount outstanding on house | | |
| | ii) Final payment date | | |
| (b) | Other liabilities (eg credit cards, personal loans, second mortgages etc - please specify) | | |

| | | | |
|--|----------------------------------|--|--|
| | SUB-TOTAL: ASSETS (6) | | |
| | LIABILITIES (7) | | |
| | NET ASSETS (6-7) | | |

8. ANY OTHER RELEVANT INFORMATION

Please enter any details which may affect the assessment of a bursary application, e.g. a significant change in income or outgoings for the coming year. You should also indicate below if there are any reasons why net assets cannot be converted or utilised to pay school fees.

9. VERIFICATION

Applications submitted without full supporting documentation will not be considered for the award or renewal of a bursary.

In order for us to assess your eligibility and allocate available bursary resources both fairly and according to need, it is essential to provide documentary evidence in support of the income and assets declared in this application form.

Please therefore, submit copies of the following items where appropriate, and tick the box to indicate those you are enclosing: - Any original documents will be returned to you as soon as possible.

| | All Applicants | Father | Mother |
|-----|--|---------------|---------------|
| (a) | Bank & building society statements for the last three months for all active accounts | | |
| (b) | Credit card statements for the last three months | | |
| (c) | Annual mortgage statement(s) or rental/lease agreement (most recent) | | |
| | Employed | | |
| (d) | P60(s) and/or P45(s) for 2017/18 & P11D if applicable | | |
| (e) | March 2018 Pay Advice slip(s) & most recent month Pay Advice slip(s) | | |
| | Unemployed | | |
| (f) | Summary of Social Security Benefits received (this information must be provided by the benefits agency) | | |
| | Self Employed | | |
| (g) | Annual Report and Accounts (including Balance Sheet) for the last two completed financial years | | |
| (h) | Full details of personal drawings or salary payments from business (this should be verified by an appropriate third party, e.g. your accountant) | | |
| (i) | Certificates of dividends received from your own company | | |
| | Miscellaneous (Please submit all that are relevant to your application) | | |
| (j) | Working Tax Credit letter of award | | |
| (k) | Child Tax Credit letter of award | | |
| (l) | Child benefit letter of award including declaration of income | | |
| (m) | Details of any pensions or other state benefits received | | |
| (n) | P60(s) for any occupational pensions received | | |
| (o) | Details of maintenance payments received | | |
| (p) | Annual investment portfolio details and statements | | |
| (q) | Details of any dividends received > £100 | | |
| (r) | Personal or other loan statement | | |
| (s) | Full details of rental income received | | |
| (t) | A copy of the 2017/18 tax calculation produced if you calculated your own tax, or a copy of the calculation sent to you by HM Revenue & Customs | | |
| (u) | Other (please specify) | | |

10. DECLARATION

The following declaration should be signed by both parents/applicants (or see below):

We/I have read the notes and have made a complete declaration of our/my financial situation and overall circumstances.

We/I understand that if we/I are/am offered a bursary and accept a place for my child/children at the school:-

- (a) Our/my school fees account will be credited for the 2019/2020 session with the full amount of the bursary.
- (b) We/I understand that any bursary is subject to annual review and that we/I must complete an annual declaration of our/my financial circumstances on the form sent to us/me by the school and supply all relevant supporting evidence by the return date indicated.
- (c) We/I must report to the school immediately any material change in the financial position declared.
- (d) The bursary may be withdrawn or reduced, and in certain circumstances, past payment reclaimed if:
 - i) **we/I have fraudulently, knowingly and/or recklessly withheld information about my/our financial circumstances, or provided false information;**
 - ii) there is a breach of the school's Terms and Conditions attached to the acceptance of a place for our/my child at the school;
 - iii) we/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
 - iv) we/I have failed to produce any additional information required by the school to evidence our/my financial circumstances;
 - v) there is in the view of the school either unsatisfactory work or conduct;
 - vi) **we/I fall more than 28 days in arrears in respect of any amount due and owing to the school;**
 - vii) there is a material change in our/my financial circumstances;
 - viii) the school deems that its resources are insufficient to maintain the level of the bursary.

Signatures:

..... Date

(Father/Stepfather/Guardian)

..... Date

(Mother/Stepmother/Guardian)

If the above declaration is signed by only one parent, please ensure that you have read Note I on page 11 and delete as necessary below:

Divorced/separated/widowed/other (if 'other' please provide clarification).

Cohabiting: YES/NO

If divorced, separated or widowed please provide documentary evidence if you have not already done so.

NOTES FOR GUIDANCE FOR COMPLETION OF BURSARY APPLICATIONS FORMS

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

1. PARENTS/APPLICANTS

These 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 the Children (Scotland) Act 1995 **and** the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household.

If parents are separated or divorced and remain joint signatories to the child's enrolment agreement, both mother and father must complete and sign the Application Form. If necessary, separated or divorced parents may complete separate Application Forms.

2. DEPENDENT CHILDREN

- e) The figures to be inserted here refer to the current academic year.
- f) Insurance Policies for School Fees – If any insurance 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 bursary.

3. INCOME

- a) The GROSS annual amount of salaries and wages, including any earnings from overtime, profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay (before deduction of tax, NI, superannuation, etc) for the current and last financial year.
- b) Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question. Copies of the latest set of accounts should be included.
- d) All 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, applicants should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS if interest exceeds £100.
- f) All social security benefits received should be declared and the type of benefit specified.
- h) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legally binding separation agreement (eg 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 bursary to be awarded. This is irrespective of whether or not the order or agreement is being complied with. Where the whole amount of the fees is required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a bursary. 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.

4. CAPITAL ASSETS

- a) 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.
- b) The current market value of your main home. The current market value should be estimated by applicants.
- e) 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 be valued at the relevant proportion of the net value of the company.
- f) In the case of second homes and/or other properties, these should be included at their estimated current market value, with the amount outstanding on any mortgage included in 7(b) Other liabilities.

FOR FINANCE DEPARTMENT USE ONLY

Name of pupil:

School:

Form received:

**Parent(s) total assessable
income for financial assistance:**

£

Less:

Allowance for dependent children:

£

Parental contribution:

£

Bursary:

£

Comments: