



APPLICATION FOR A THOMAS'S FOUNDATION BURSARY FOR PUPILS WISHING TO JOIN THOMAS'S

STATEMENT OF FAMILY AND FINANCIAL CIRCUMSTANCES

The Thomas's Foundation (TF) Bursary Committee attaches great importance to the **Covering Letter**. Please give as full an explanation as possible of the family and financial circumstances as well as of your intentions for your child's future education. Tell us about:

- Your current family circumstances, family members and home situation, leisure activities, interests and more
- Both parents' work situation (job title, organisation, position held for how long, advantages/disadvantages, future opportunities, former jobs)
- Your current financial situation and future financial plans
- Your child's current school experience
- Plans for your child's future education after Thomas's
- Any additional information that you feel might be relevant

If you have any queries or would like assistance completing this application, please contact Mrs Lucy Horstead on 020 3327 4691.

Please return the completed application with the photocopied supporting documents to:

**Lucy Horstead
Bursary Administrator
Thomas's Foundation
Thomas's Academy
New King's Road
London
SW6 4LY**

CONFIDENTIAL WHEN COMPLETED

Thomas's Foundation (CIO)

Thomas's Academy, New King's Road, London SW6 4LY

T: 020 3327 4177 E: info@thomassfoundation.org.uk W: www.thomassfoundation.org.uk

Registered Charity No: 1181145

NOTES FOR PARENTS ON COMPLETING A THOMAS'S FOUNDATION BURSARY APPLICATION

- TF Bursaries are subject to the TERMS AND CONDITIONS outlined at the back. Please read these carefully before starting to complete your form.
- Please note that before completing the form below, your child should have already applied to Thomas's.
- Please complete the form by downloading it from the website. Type your answers and print it. If this is not possible please print the form and fill it in using black ink and **BLOCK CAPITALS**.
- Please include all documentation as requested in the DOCUMENT CHECKLIST.
- Parents* are reminded that if false information is knowingly or thoughtlessly provided, TF may withdraw the Bursary Award and may seek to recover any benefits received.
- Where possible, both Parents/Guardians should complete this application form jointly.
- All information must be completed for both parents* and both must sign the declaration.
- Where the parents are separated/divorced, we expect to receive two application forms, one from each parent.
- If you are applying as a single parent, and have legal sole custody of the child, please include the relevant documentation.
- If you are applying as Guardian/Fee Payer, we normally expect you to apply jointly with another Guardian (if there is more than one Guardian).
- If you have any additional information which you feel would help your application, please put it on a separate sheet or in the covering letter and include it with the form.

PERSONAL DETAILS

CHILD

Full name

(please underline name generally used)

Date of birth

Gender (*boy/girl*)

Current school and year

PARENTS / GUARDIANS

Parent 1 *

Parent 2 *

Name

Title (*Mr, Mrs, Miss, Ms, etc*)

Person with whom the child lives
(please tick one or both)

Address

Daytime telephone number

Mobile telephone number

E-mail address

Occupation

Are you employed/ self-employed/ unemployed/ retired/ homemaker?

Name of employer (*if applicable*)

Are you a company director?

YES / NO

YES / NO

If yes, please provide details of share holdings

%

%

Name of company (*if applicable*)

DEPENDENT CHILDREN

Please list ALL the children whom you support financially including the child you are applying for.

	1	2	3	4
Name	_____	_____	_____	_____
Date of birth	_____	_____	_____	_____
Age	_____	_____	_____	_____
Gender (<i>boy / girl</i>)	_____	_____	_____	_____
Name of current school / college	_____	_____	_____	_____
Type of school (<i>day / boarding / state / private</i>)	_____	_____	_____	_____
	£	£	£	£
Annual school fees / other educational fees/bursaries (<i>if applicable</i>)	_____	_____	_____	_____
Clubs / other activities (<i>e.g. sport, music, drama</i>)	_____	_____	_____	_____
Amount of fees shown above covered by Bursaries/ scholarships/ other allowances given by the school (<i>if applicable</i>)	_____	_____	_____	_____
Assistance from other sources (<i>if applicable, e.g. grandparents, trusts</i>)	_____	_____	_____	_____
Child's annual income (<i>e.g. from interest on savings, trusts</i>)	_____	_____	_____	_____
Any other childcare costs (<i>e.g. childminder</i>)	_____	_____	_____	_____

Any other dependents whom you support financially

*or guardian or other fee payer

FINANCIAL DETAILS

These sections must be completed in full. **Enter 'NIL' if applicable but do not leave any blanks.**

Income, expenditure and capital valuations should be for **the date the form is signed** or **the most recent tax year** where appropriate.

If figures entered differ significantly from previous years or may be different in the future please tell us why on a separate piece of paper or in your covering letter.

Please provide photocopies of documents as detailed on the enclosed **DOCUMENTATION CHECKLIST**.

We appreciate that some of the answers may be 'nil' and that you will have to do a fair amount of work to supply the information to us. Please understand our need to have a full and accurate disclosure.

ANNUAL INCOME (UK AND OVERSEAS)

(all income is to be stated gross)

a) Regular Income

Parent 1 *

Parent 2 *

£

£

Gross salary

Any bonuses

Income from other jobs

Benefits in kind provided free by employer (e.g. car, housing, health insurance etc., please be specific)

Pension or retirement pay (if applicable)

Profit from business or profession (last 12 months)

Building Society, Bank and other interests

Gross rental income from properties (UK and overseas)

Any other income from UK or overseas

Income from ISAs, capital gains, endowment plans, life assurances, investment bonds (last three years)

Maintenance & alimony payments received

TOTAL REGULAR INCOME

**b) Government Assistance
(Benefits)**

Parent 1 *

Parent 2 *

£

£

Universal credit

Child benefit

Child tax credit

Working tax credit

Housing benefit

Council tax reduction

Jobseeker's Allowance

Disability Living Allowance

Other benefits (please specify)

**TOTAL GOVERNMENT
BENEFITS**

c) Lump Sum Payments

Parent 1 *

Parent 2 *

£

£

Redundancy payments

Disposal (sale) of assets in the
last three years (*e.g. properties,
shareholdings*)

Inheritances received in the last
three years (*please be specific*)

Donations or lump sum
payments

**TOTAL LUMP SUM
PAYMENTS**

**TOTAL ANNUAL INCOME
(a + b + c)**

ALL UK & OVERSEAS ASSETS

(at current market value)

Parent 1 *
(to the nearest £1000)

Parent 2 *
(to the nearest £1000)

House value

Other houses / properties *(if applicable; please give details including addresses)*

Car /s

Valuable possessions
(insurance value of home contents and personal valuable items)

Building society deposits / savings accounts

Cash in bank

Investments/ shares/ bonds/ ISAs/ trusts *(give specific details using a separate piece of paper if necessary)*

Any other assets *(value of business, assets abroad etc)*

Pension assets *(please list **ALL pensions**, the value and date of maturity)*

TOTAL ASSETS

TAXATION**Parent 1 *****Parent 2 ***

£

£

Tax on income

Tax on capital gains

National Insurance

**TOTAL TAX / NATIONAL
INSURANCE**

ANNUAL EXPENDITURE**Parent 1 *****Parent 2 ***

£

£

Mortgage repayments

Rent

Council Tax

Electricity

Gas

Water

Telephones / Broadband / TV /
Mobiles

*Car (maintenance, petrol,
parking, finance, insurance)*

Regular travel expenses
(excluding car)

House insurance

Life insurance

Food expenses

Clothing

Medical expenses	_____	_____
Pet expenses	_____	_____
Child care expenses	_____	_____
Tutors	_____	_____
Children's clubs	_____	_____
Maintenance and alimony payments	_____	_____
Pension contributions	_____	_____
School fees paid, including extras <i>(after subtracting any assistance or scholarships)</i>	_____	_____
Any other significant expenditure	_____	_____
TOTAL ANNUAL EXPENDITURE	_____	_____

DEBTS	Parent 1 *	Parent 2 *
	£	£
Outstanding mortgage value	_____	_____
2 nd Mortgage <i>(if applicable)</i>	_____	_____
Bank overdrafts	_____	_____
All loans	_____	_____
Credit card balances	_____	_____
Car finance	_____	_____
Any other borrowing <i>(e.g. from family, friends, employer)</i>	_____	_____
TOTAL DEBTS	_____	_____

DOCUMENTATION CHECKLIST

- Please ensure your application is complete.
- Please provide copies of the documentation that supports your completed application form including, if applicable, legal custody documents
- Please tick the appropriate boxes below or write n/a if not applicable.
- If you have additional documentation that you think is relevant to your application, please include it.

INCOME

(please include all UK and any overseas income)

Parent 1 ***Parent 2 ***

Last three payslips

For shareholders of private limited companies, a copy of the latest available accounts

Dividend certificates

Statements of interest received

Statement of rental income other than those included in your tax return

Documentation of income from ISA, trusts, endowment plans, life assurances, investment bonds, capital gains
(if not included in your self-assessment return)

Documentation of maintenance & alimony payments received

Statements of ALL government assistance (Benefits) received

Redundancy documentation

Documentation of sales of assets

Inheritance documentation

Any other documentation relating to INCOME
(please specify)

ASSETS*(please include all UK and any overseas assets)*

	Parent 1 *	Parent 2 *
House value <i>(if made personally please state how)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Value of other properties	<input type="checkbox"/>	<input type="checkbox"/>
Insurance documents	<input type="checkbox"/>	<input type="checkbox"/>
- Car	<input type="checkbox"/>	<input type="checkbox"/>
- House	<input type="checkbox"/>	<input type="checkbox"/>
- Other valuable possessions	<input type="checkbox"/>	<input type="checkbox"/>
Last three months' bank statements <i>(for ALL bank accounts including business accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Last three months' savings statement <i>(for ALL Savings Accounts)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation in relation to ASSETS <i>(please specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>

TAXATION

	Parent 1 *	Parent 2 *
Latest available HMRC self-assessment return and HMRC tax calculation	<input type="checkbox"/>	<input type="checkbox"/>
P60 (end of financial year)	<input type="checkbox"/>	<input type="checkbox"/>
P45 (end of employment)	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation relating to TAXATION <i>(please specify)</i>	<input type="checkbox"/>	<input type="checkbox"/>

EXPENDITURE / LIVING EXPENSES

Parent 1 *

Parent 2 *

Mortgage statements (*for ALL mortgages*)

Credit card statements (*last three months for ALL credit cards*)

Rent statement

Council Tax Bill

Last two utilities bills including:

- Electricity

- Gas

- Water

- Telephone / Broadband / Television / Mobile

Bank statements (*last three months for ALL accounts*)

Savings Statements (*last three months for ALL accounts*)

Documentation of maintenance or alimony payments

Any other documentation relating to EXPENDITURE
(*please specify*)

DEBTS

Parent 1 *

Parent 2 *

Bank overdrafts (*All accounts*)

Bank loans (*All accounts*)

Other loans (*All accounts*)

Company liabilities (*All accounts*)

Any other loan agreements

Any other documentation relating to DEBTS
(*please specify*)

LEGAL CUSTODY

Supporting documentation
(*please specify*)

The Trustees of the TF expect applicants to have made serious endeavours to obtain support from family members or friends where appropriate. Which family members have you approached and have any contributions been offered?

Any other relevant information:

Please indicate how much you feel you can contribute to school fees each term:

DECLARATION AND SIGNATURES

I/We declare that I/we have checked this form and to the best of my/our knowledge all information provided is a true and correct representation of the facts relevant to this application.

I/We undertake to renew this statement annually, when called upon to do so and in any case to report immediately to the Chair of Trustees of TF any material change in the financial position detailed.

I/We understand that if false information is knowingly or thoughtlessly provided, TF may withdraw the TF Bursary award and seek to recover any benefits received under the award.

I/we have read and understood the TF Bursary TERMS AND CONDITIONS.

I/We give explicit consent to the disclosure of the information

I/We have supplied to the members of the TF Bursary Committee, to the Trustees of TF and to the Principals of Thomas's London Day Schools.

I/We understand that the information will not be disclosed to other parties without my/our written consent in each case.

Date:	Signature:	Parent 1/ Guardian/ Other fee payer (please circle)
_____	_____	
Date:	Signature:	Parent 2/ Guardian/ Other fee payer (please circle)
_____	_____	



TERMS AND CONDITIONS

1. Award of a TF Bursary

The award of any TF Bursary, its amount, its duration and any renewal of it are at the absolute discretion of the Trustees of Thomas's Foundation (TF).

2. Obligations of the Pupil

The recipient of a TF Bursary is expected to work hard, to contribute positively to life at Thomas's, to be a credit to the school and set a good example to other pupils. These matters will be monitored by the TF Bursaries Committee through regular school reports.

3. Obligations of the Parents*

Parents* of a TF Bursary recipient must

- supply truthful and complete information and update this information annually
- notify Trustees immediately of any change in personal or financial circumstances
- support and encourage the pupil to fulfil his or her obligations
- uphold the aims and good name of Thomas's London Day Schools and TF
- pay the share of fees not met by the award of a TF Bursary
- cover all extra expenses unless informed otherwise by TF

4. Withdrawal of a TF Bursary

The award of a TF Bursary will be withdrawn by written notice to a parent* if in the opinion of the Trustees acting in good faith

- the pupil or a parent* has not complied with their respective obligations set out above,
- the financial circumstances of the parents* have improved materially
- the amount payable by the parents* remains unpaid 28 days after a written reminder has been sent out to the parents*.

Withdrawal or reduction of a TF Bursary will take effect from the start of the following term.

5. Incorrect or incomplete Information – Repayment

Parents* will be required upon written notice to repay immediately all or part of the TF Bursary benefits received if a parent* has supplied information which in the opinion of the Trustees is incorrect or incomplete or if they have failed to supply additional information about any change in personal or financial circumstances that could affect the assessment or reassessment by the TF Bursary Committee.

6. Confidentiality

The Trustees of TF and the Bursary Committee will observe strict confidentiality concerning the circumstances of parents* and any information received from parents* or third parties in

connection with any TF Bursary. Similarly, parents* are required to keep their dealings with TF confidential.

7. Secondary Education

The Head of the Thomas's school which the TF Bursary recipient attends and the TF senior schools advisor can give advice and support at the appropriate time on applying for financial assistance at the pupil's next school.

Revised 6th October 2021