



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

All applications for September 2021 Bursaries need to be received by noon on Friday March 5th 2021

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
C/o Holly House
Clandon Road
West Clandon
Surrey
GU47TL

CONFIDENTIAL WHEN COMPLETED

* or guardian or other fee payer

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 and been offered a place at one of the Thomas's Schools.
- 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 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.

Covering Letter

Date: _____

Covering Letter

Covering Letter

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? _____

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 (<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

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.

1. ANNUAL INCOME (UK AND OVERSEAS)

(all income is to be stated gross)

a) Regular Income	£ Parent 1 *	£ Parent 2 *
Salary / wages <i>(including bonuses)</i>	<hr/>	<hr/>
Income from other jobs	<hr/>	<hr/>
Benefits in kind provided free by employer <i>(e.g. car, housing, health insurance etc., please be specific)</i>	<hr/>	<hr/>
Pension or retirement pay	<hr/>	<hr/>
Profit from business or profession <i>(last three years)</i>	<hr/>	<hr/>
Building Society, Bank and other interests	<hr/>	<hr/>
Rental income from properties <i>(UK and overseas)</i>	<hr/>	<hr/>
	<hr/>	<hr/>

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)

- Universal credit

- Child benefit

- Council tax reduction

Other Benefits (e.g.)

- Child tax credit

- Working tax credit

- Housing benefit

- Income support

- Employment & Support Allowance

- Jobseeker's Allowance

- Disability Living Allowance

- Other benefits (*please specify*)

TOTAL GOVERNMENT BENEFITS

c) Lump Sum Payments

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)

2. ALL UK & OVERSEAS ASSETS (*at current market value*)

Parent 1 *
(to the nearest £1000)

Parent 2 *
(to the nearest £1000)

House / property
(*principal residence*)

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

3. TAXATION

£ Parent 1 *

£ Parent 2 *

Tax on income

Tax on capital gains

National Insurance

TOTAL TAX / NATIONAL INSURANCE

4. ANNUAL EXPENDITURE

£ Parent 1 *

£ Parent 2 *

Mortgage repayments

- Capital

- Interest

Loans and credit card
repayments

Rent

Council Tax

Electricity

Gas

Water

Telephones / Broadband / TV

Car (*maintenance, petrol,
parking*)

Regular travel expenses
(*excluding car*)

Other regular living expenses
(*e.g. food, clothing etc.*)

Maintenance and alimony
payments

Pension contributions

School fees paid, including
extras (*after subtracting any
assistance or scholarships*)

Insurance

- House / home

- Car

- Life

- Other (*e.g. medical,
travel*)

Any other significant
expenditure

TOTAL ANNUAL
EXPENDITURE

5. DEBTS

	Parent 1 *	Parent 2 *
	£	£
Mortgage		
2 nd Mortgage <i>(if applicable)</i>		
Bank overdraft		
2 nd Bank account overdraft <i>(if applicable)</i>		
3 rd Bank account overdraft <i>(if applicable)</i>		
Building Society loan		
2 nd Building Society loan <i>(if applicable)</i>		
3 rd Building Society loan <i>(if applicable)</i>		
Credit card		
2 nd Credit card <i>(if applicable)</i>		
3 rd Credit card <i>(if applicable)</i>		
4 th Credit card <i>(if applicable)</i>		
5 th Credit card <i>(if applicable)</i>		
Other loans <i>(e.g. car)</i>		
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.
- ☐ 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.

	Parent 1 *	Parent 2 *
INCOME		
<i>(please include all UK and any overseas income)</i>		
Latest payslip	<input type="checkbox"/>	<input type="checkbox"/>
March payslip	<input type="checkbox"/>	<input type="checkbox"/>
Pension pay advice	<input type="checkbox"/>	<input type="checkbox"/>
For shareholders of private limited companies, a copy of the latest available accounts	<input type="checkbox"/>	<input type="checkbox"/>
Dividend certificates	<input type="checkbox"/>	<input type="checkbox"/>
Statements of interest received or building society passbook	<input type="checkbox"/>	<input type="checkbox"/>
Statement of untaxed interests	<input type="checkbox"/>	<input type="checkbox"/>
Statement of rental income other than those included in your tax return	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of income from ISA, trusts, endowment plans, life assurances, investment bonds, capital gains <i>(if not included in your self-assessment return)</i>	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of maintenance & alimony payments received	<input type="checkbox"/>	<input type="checkbox"/>
Statements of government assistance (Benefits) received, including Universal Benefit or other benefits	<input type="checkbox"/>	<input type="checkbox"/>

Child benefit	<input type="checkbox"/>	<input type="checkbox"/>
Council Tax reduction	<input type="checkbox"/>	<input type="checkbox"/>
Redundancy documentation	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of sales of assets	<input type="checkbox"/>	<input type="checkbox"/>
Inheritance documentation	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation relating to INCOME (<i>specify</i>)	<input type="checkbox"/>	<input type="checkbox"/>

Parent 1 *

Parent 2 *

ASSETS*(please include all UK and any overseas assets)*Recent property valuation (*if made personally please state how*)Valuation of further properties (*if made personally please state how*)

Insurance documents

- Car
- Other valuable possessions

Last three months' bank statements
(*for ALL bank accounts including business accounts*)Building Society passbook or statements
(*for ALL Building Society Accounts*)Any other documentation in relation to ASSETS
(*please specify*)

Parent 1 *

Parent 2 *

TAXATIONLatest available HMRC self-assessment return and
HMRC tax calculation

P60 (end of financial year)

P45 (end of employment)	<input type="checkbox"/>	<input type="checkbox"/>
P11D (benefits in kind, e.g. company car)	<input type="checkbox"/>	<input type="checkbox"/>
Notification of Tax coding	<input type="checkbox"/>	<input type="checkbox"/>
Any other documentation relating to TAXATION (please specify)	<input type="checkbox"/>	<input type="checkbox"/>

	Parent 1 *	Parent 2 *
EXPENDITURE / LIVING EXPENSES		
Mortgage statements (<i>for ALL mortgages</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Credit card statements (<i>last three months for ALL credit cards</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Rent statement	<input type="checkbox"/>	<input type="checkbox"/>
Council Tax Bill	<input type="checkbox"/>	<input type="checkbox"/>
Last two utilities bills including:		
- Electricity	<input type="checkbox"/>	<input type="checkbox"/>
- Gas	<input type="checkbox"/>	<input type="checkbox"/>
- Water	<input type="checkbox"/>	<input type="checkbox"/>
- Telephone / Broadband / Television	<input type="checkbox"/>	<input type="checkbox"/>
Bank statements (<i>last three months for ALL accounts</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Building Society (<i>last three months for ALL accounts</i>)	<input type="checkbox"/>	<input type="checkbox"/>
Documentation of maintenance or alimony payments	<input type="checkbox"/>	<input type="checkbox"/>
Pension payments	<input type="checkbox"/>	<input type="checkbox"/>

Insurance documents

- | | | |
|---|--------------------------|--------------------------|
| - House | <input type="checkbox"/> | <input type="checkbox"/> |
| - Car | <input type="checkbox"/> | <input type="checkbox"/> |
| - Life | <input type="checkbox"/> | <input type="checkbox"/> |
| - Other (<i>e.g. medical, travel</i>) | <input type="checkbox"/> | <input type="checkbox"/> |

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

<input type="checkbox"/>	<input type="checkbox"/>
--------------------------	--------------------------

Parent 1 *

Parent 2 *

DEBTS

- | | | |
|--|--------------------------|--------------------------|
| Bank overdrafts (<i>All accounts</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| Bank loans (<i>All accounts</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| Building Society loans (<i>All accounts</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| Credit cards (<i>All credit cards</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| Company liabilities (<i>All accounts</i>) | <input type="checkbox"/> | <input type="checkbox"/> |
| Any other loan agreements | <input type="checkbox"/> | <input type="checkbox"/> |
| Any other documentation relating to DEBTS | <input type="checkbox"/> | <input type="checkbox"/> |

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:

TF Bursaries awarded are up to a maximum of 90% of the annual school fees. How much do you think you can personally contribute?

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.