

Bursary Application Form

Confidential



Please make sure you have read both the Bursaries Policy and the Guidance Notes before completing this Application Form

This Application Form plus Appendix 1 (if relevant) should be completed in full and sent with all relevant supporting documentation to: Fees and Bursaries Accountant, Finance Department, Eton College, Eton, Windsor, SL4 6DB

The deadline for the submission of the application can be found in either the conditional offer letter that has been sent to you or the Prospectus for the relevant scholarship entry programme. Late applications will reduce the likelihood of an award being made.

Separate application forms can be submitted by parents who are divorced or separated where they each retain parental responsibility for their son.

Please indicate why you are making this application. More than one option may apply and be ticked.

- Our/my son has a conditional offer of a place at Eton for entry at age 13
- Our my/son is applying for a King's Scholarship
- Our my/son is applying for a Music Scholarship
- Our my/son is applying for a New Foundation Scholarship (entry from state sector at age 13)
- Our my/son is applying for a Sixth Form Scholarship (entry from state sector at age 16)
- Our/my son is already at the school but there has been a change in our circumstances
- Annual Review in respect of a current bursary award

1 The Candidate	
<small>Please tell us about your son. All applications must be accompanied by a copy of you son's full (unabridged) birth certificate</small>	
a	Full Name (Please underline surname)
b	Nationality
c	Will your son require a visa to attend the school? <input type="checkbox"/> YES <input type="checkbox"/> NO
d	Date of Birth
e	Place of Birth
f	When will/did your son enter Eton?
g	Who is his house master (if known)
h	Was the candidate's father, grandfather or uncle at Eton? <small>(This information may affect the source of bursary funds)</small> <input type="checkbox"/> YES <input type="checkbox"/> NO
i	If YES, please provide details of name and relationship to candidate

2	The Parents Please tell us about yourselves	Parent #1 (eg Father)	Parent #2 (eg Mother)
a	Full Name (Please underline surname)		
b	Title (Mr/Mrs/Dr/Other)		
c	Relationship Status		
d	Nationality		
e	Date of Birth		
f	Home Address (including post code)		
g	Day Time Telephone		
h	Evening Telephone		
i	Mobile		
j	Email Address		

3	The Parents' Occupations Please tell us about your work	Parent #1 (eg Father)	Parent #2 (eg Mother)
a	Are you (please tick all categories that are relevant):		
	<ul style="list-style-type: none"> • Employed? If YES, complete section 3b. Use an additional sheet if you have more than one employer. 	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	<ul style="list-style-type: none"> • Self-employed If YES, complete section 3c 	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	<ul style="list-style-type: none"> • Unemployed/Retired/Other? If YES, complete section 3d 	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
b	If employed, please give:		
	Job title		
	Employer's Name		
	Employer's Address		
	Description of Employer's Business		

c	If self-employed, please give:		
	Job title		
	Name of Business		
	Address of Business		
	Are you a director/shareholder/proprietor of this company or business?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	If YES state proportion of company or business you and/or your spouse/partner own	_____ %	_____ %
d	If unemployed/retired/homemaker/other, please give:		
	Your current status		
	If unemployed, the start date of your redundancy, the nature of your previous employment and your previous earnings If homemaker, please provide details of any previous employment and current plans to return to work (if any)		

4	Property, Savings and Other Assets Please tell us about the assets that you own	Parent #1 (eg Father)	Parent #2 (eg Mother)
a	Do you own the home disclosed at section 2(f)?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	If YES, please give approximate current market value of your home		
	Please specify freehold or leasehold and, where appropriate, acreage; give number of bedrooms and reception rooms		
b	Approximate current market value of other possessions:		
	• Car(s)		
	• Make and Year of manufacture		
	• House contents/other items or collections (specify items of particular value)		
	• Description of items		

c	Approximate current market value of your interest in any other property, land or buildings either in the UK or abroad in total (please complete specific details at Appendix 1)		
d	Cash at bank/building society:		
	• Current account		
	• Savings accounts		
e	Approximate current market value of all investments:		
	• Bank or building society deposits/ National Savings accounts		
	• Equity investments, (shares, unit trusts, corporate bonds and other securities) and Government stocks		
	• PEPs, ISAs, TESSAs		
	• Any other assets held as investments		
f	Net worth/value of any businesses which you own or share		
g	Redundancy or other termination payments		
h	Monies that are owed to you		
i	Approximate current market value of any other assets:		
	• Insurance policies maturing in the next 5 years		
	• Share options		
	• Assets held by or on behalf of the candidate		
	TOTAL ASSETS		

5	Mortgages, Borrowings and Loans Please give details of any amounts you owe to banks and other lenders	Parent #1 (eg Father)	Parent #2(eg Mother)
a	Mortgage Details in respect of your home:		
	<ul style="list-style-type: none"> amount outstanding on principal residence disclosed at Section 4a 		
	<ul style="list-style-type: none"> final payment date 		
	<ul style="list-style-type: none"> is this a repayment or interest only mortgage? 		
b	Outstanding mortgages on all other properties declared at Section 4c (please complete full details at Appendix 1)		
c	What is the total amount you owe in respect of:		
	<ul style="list-style-type: none"> Bank Overdrafts 		
	<ul style="list-style-type: none"> Credit cards and store cards 		
	<ul style="list-style-type: none"> Student Loans 		
	<ul style="list-style-type: none"> Loans from family members 		
	<ul style="list-style-type: none"> Other loans 		
	<ul style="list-style-type: none"> Specify purposes of Other loans 		
	TOTAL LIABILITIES		

6	Net Assets	Parent #1 (eg Father)	Parent #2 (eg Mother)
	TOTAL Property, Savings and Other Assets (shown at section 4)		
	TOTAL Borrowings and Loans (shown at section 5)		
	TOTAL NET ASSETS		

Please explain any reasons why net assets cannot be sold or converted into cash to pay school fees. Please continue on an additional sheet if necessary:

7	Income Please complete these details for a full 12 months based on your current income. Enter all amounts in whole numbers (British £) or put 0 if relevant. Supporting documentation is required (see section 17)	Parent #1 (eg Father)	Parent #2 (eg Mother)
a	Income from all employments:		
	<ul style="list-style-type: none"> Gross salary (excluding bonus and benefits in kind and expenses) 		
	<ul style="list-style-type: none"> Annual bonus 		
	<ul style="list-style-type: none"> Is this bonus guaranteed? 	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
b	Income from self-employment:		
	<ul style="list-style-type: none"> Taxable income from self-employed trade or profession 		
	<ul style="list-style-type: none"> Dividend income from owner-managed businesses 		
c	Gross pension, widow's pension or state pension		
d	Gross investment income from:		
	<ul style="list-style-type: none"> Building Societies /Banks 		
	<ul style="list-style-type: none"> Dividends and interest (other securities) 		
e	Income from all other properties:		
	Rental profit as disclosed on your tax return (and shown at Appendix 2)		
	Number of properties this relates to		
f	Total Social Security benefits		
	Please list all benefits you receive:		
g	Separation or Maintenance Allowance		
	Is there a Court Order or Separation Agreement?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	If YES, does this specify any arrangements for the payment of school fees?	<input type="checkbox"/> YES <input type="checkbox"/> NO	<input type="checkbox"/> YES <input type="checkbox"/> NO
	If YES, please state the amount to be paid in respect of each school year and by whom		

h	Benefits in Kind provided by reason of employment or business not already included in (a) above (e.g. car, health insurance)		
i	Any other income or gains not included in (a) to (h) above:		
	• Income from other assets or trusts		
	• Income from insurance policies or permanent health plans		
	• Income from family members (state from whom)		
	• Other income		
	TOTAL INCOME (including benefits in kind)		

8	Employment and Housing Costs Please complete these details for a full 12 months based on your current expenditure. Enter all amounts in whole numbers (British £) or put 0 if relevant. Supporting documentation is required (see section 17)	Parent #1 (eg Father)	Parent #2 (eg Mother)
a	Tax payable on All Income declared at section 7		
b	National Insurance Contributions		
c	Pension contributions		
d	Total repayments on mortgage shown at 5(a)		
e	Endowment payments		
f	Annual landlord rent payable on residence		
g	Life assurance premiums		
h	Private healthcare premiums		
i	Any other regular loan/interest repayments:		
	• Bank loans or overdrafts		
	• Credit cards and store cards		
	• Student Loans		
	• Loans from family members		
	• Other loans		
	TOTAL EMPLOYMENT AND HOUSING COSTS (excluding regular household expenditure)		

9	Household Expenditure This information should be completed for your household. Please complete these details for a full 12 months based on your current expenditure. You may find it easier to complete this information for a typical month and then to multiply the costs by 12. Enter all amounts in whole numbers (British £) or put 0 if appropriate.	Monthly costs	Annual costs
a	Property Expenses		
	• Buildings & contents insurance		
	• Council Tax		
	• Water Rates		
	• Combined utilities (oil, gas, electricity)		
	• Other property expenses (eg service charges)		
b	General Household Expenses		
	• Food & groceries		
	• Home telephone & internet		
	• Repairs & maintenance		
	• Other insurances (eg pet insurance)		
	• TV Licence		
	• Sky TV & other entertainment		
	• Laundry or dry cleaning		
	• Other household expenses		
c	Motoring Expenses		
	• Petrol & oil		
	• Road tax		
	• Car insurance		
	• Car servicing		
	• Repairs		
	• AA/RAC subscriptions		
d	Personal Expenses		
	• Clothing & footwear		
	• Mobile phones (including children)		
	• Gifts to charities		
	• Travelling expenses (not motoring)		
	• Other personal expenses (eg eating out, gifts, hairdressing)		

e	Healthcare expenses		
	• Dentist's fees		
	• Doctor's fees & prescriptions		
	• Optician's fees		
f	Children's expenses		
	• Childcare expenses (au pair, childminder, after school clubs)		
	• Tutors		
	• Clubs		
g	Other expenditure (not included elsewhere)		
	• Other costs (please specify)		
	TOTAL HOUSEHOLD EXPENDITURE		

10	Net Income	Parent #1 (eg Father)	Parent #2 (eg Mother)
	Please calculate your total income minus your outgoings as listed in Sections 7,8 and 9.		
	TOTAL Income (shown at section 7)		
	TOTAL Employment, Housing and Household Costs (shown at sections 8 and 9)		
	TOTAL NET INCOME (before school fees)		
	If Net Income is very low or negative, please give details of how you manage to cover your expenses on an on-going basis (eg if you receive financial support from anyone).		

11	Pension Arrangements
	<p>Please tell us about your pension arrangements. In particular please provide the following details:</p> <ul style="list-style-type: none"> • Are you currently contributing or have you previously contributed to a pension scheme? • If so, is the scheme a defined contribution or a defined benefit scheme? • How much does your employer (if relevant) contribute to your pension arrangements (in % or value terms)? • If you are not in a workplace pension scheme do you have other arrangements in place eg a SIPP? • What do you estimate the current value of your pension pot(s) to be?

12	Anticipated Improvement In Circumstances
	Please indicate below if you expect promotion or any other significant improvement in your circumstances in the foreseeable future

13	Parental contribution to School Fees
	The Bursaries Committee uses limited, charitable funds to make bursary awards. Please estimate how much you can afford to pay in total each year towards Eton school fees and extras.
	£

14 All Dependent Children				
Please include details about the candidate and any other children including those in further education. If there are more than 4 children please give details on a separate sheet.				
	The candidate	2	3	4
a	First name			
b	Gender			
c	Date of Birth (dd-mm-yy)			
d	Name of Current School, College or University			
e	Please state whether fee-paying or state			
f	Please state whether day-pupil or boarding			
g	Annual school or other educational fees (excluding extras)			
h	School extras			
i	Amount of fees shown in (g) covered by:			
	• Scholarships, Bursaries or other allowances given by school			
	• Services/Diplomatic/Company Education Allowances (gross) (state whether sum has been included in gross salary in Section 7 (a))			
	• Annual sum arising from Educational Insurance Policies			
	• Assistance from any other sources, eg grandparents, step-parents, godparents, trusts, charities, etc			
	Please specify source			
j	Annual income of child (if any)			

15 Other Dependants	
Please give details of any other dependants and how much you contribute towards their care or upkeep	

16 Additional Information	
a	Holiday Profile: please outline your family's foreign and UK holiday profile including costs over the last two years and any plans you have in place for holidays in the next 12 months.
b	Family support: Are grandparents or other extended family members in a position to assist with fees?

17 Supporting Documentation

Please enclose copies of documentary evidence in support of the figures disclosed above. Please tick those you are enclosing. Applications are strengthened if full documentation is provided, and weakened if it is not.

In respect of the candidate:

Full (unabridged) birth certificate

In respect of income and expenditure:

	Parent #1 (eg Father)	Parent #2 (eg Mother)
--	-----------------------	-----------------------

Payslips (latest 3)

P60 (latest) plus March payslip or confirmation of Schedule D self-employment income from an independent accountant

P45 if you left employment in the last year

HMRC tax calculation (last 2 years for self-assessment)

Business accounts, including detailed profit & loss account and balance sheet (last 2 years)

If majority shareholder, director or owner

Bank and credit card statements (last three months)

Confirmation letter(s) in respect of all social security benefits

Court order/Separation or Divorce Agreement

where these cover arrangements for the payment of school fees and child maintenance

In respect of assets and borrowings:

	Parent #1 (eg Father)	Parent #2 (eg Mother)
--	-----------------------	-----------------------

Mortgage statement(s)

Property valuation(s) of all properties in the UK and abroad

Investment portfolio valuation report

Home contents insurance policy

Any additional information supplied

18 Home Visit

The school, or its representative, may wish to visit you at your home address to discuss your application for a bursary. Should we do so, you will be contacted to arrange a time that is as convenient for you as possible. Please indicate your agreement to this.

Yes, I agree to a home visit (please tick)

19 Declaration

a In submitting this bursary application:

(i) we recognise that the school does not have sufficient bursary funds to provide school fee assistance to all those who apply and it is, therefore, possible that the school may not be in a position to support our application and will not make an offer of a bursary; and

(ii) we accept that the school reserves the right to withdraw the offer of a conditional place in respect of our son in any of the following circumstances:

- if, after reviewing our application, the Bursaries Committee does not make an offer of a bursary and considers that we are not in a position to afford the fees; or
- if the school reasonably considers that we have fraudulently, knowingly or recklessly provided incomplete or false information in connection with our bursary application; or
- if, in the school's opinion, we can afford to pay the fees but have been opportunistic in applying for a bursary award. The school takes a sceptical view of such applications given the number of parents in genuine need.

b We confirm that we have made a complete and accurate declaration of our current income and expenditure and assets and liabilities in the Bursary Application Form.

c We understand that if we are offered a bursary for our son and accept that award the following terms and conditions will apply as between us and the school:

(i) the School Account for our son will be credited termly with the amount of the bursary for so long as the award remains in place;

(ii) any bursary award is subject to annual review and we must complete an annual declaration of our financial circumstances on the form sent to us by the school and supply all relevant supporting evidence by the return date indicated;

(iii) we must report immediately any significant change in the financial position declared on this form;

(iv) the bursary award may be withdrawn or reduced if:

- we act in breach of the school's Parent Contract (attached to the Acceptance Form) as may be amended from time to time; or
- we fail to return the annual declaration of our financial circumstances by the return date indicated; or
- we fail to produce any additional information required by the school to evidence our financial circumstances; or
- in the opinion of the Head Master, our son's attendance, progress or behaviour no longer merits the continuation of the award; or
- we fail to pay the school under the terms of the Parent Contract; or
- there is a material improvement in our financial circumstances such that the school determines we are able to contribute towards school fees; or
- we have fraudulently, knowingly or recklessly provided false information in relation to the award of a bursary, in which case the value of the bursary previously credited against our son's fee account will become repayable to the school forthwith.

Signatures:	
Parent #1 (eg Father)	Parent #2 (eg Mother)
Date	Date

Bursary Application Form
Confidential



Appendix 1 - Other Property, Land or Buildings

For each property that you own complete the following information

Full address of property (including post code)	Owned by Father (F), Mother (M) or Joint(J)	Purchase date (dd/mm/yy)	Current value £	Current mortgage £	Interest or repayment mortgage?	Purchase price £	Rental income £	Rental profit £
TOTAL VALUES								

To agree with application form:

Section 4c Section 5b

Section 7e

Name of Candidate: