

# **Howard Leopald Davis Scholarship Trust**

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**Jersey College for Girls  
Victoria College**

**Application form for financial assistance**

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Victoria College**

**Application form for financial assistance**

This form must be read together with the information provided to you by the school in relation to the scholarships of bursaries available. Please read the notes below before you fill in the form.

In this document the following definitions apply:-

'Child(ren)'	
'Child(ren) of the family'	A child or children of one adult in the household only who has/have been recognised by the other adult as a child of the family unit.
Parent	Each of the mother and father
Mother	The person whose name is on the birth certificate as the mother
Father	The person whose name is on the birth certificate as the father whether or not he has parental responsibility.
Parental income	Includes income from all sources and includes benefits in kind or perquisites
Gross income OR	The income before any deductions for tax, social security and any other deductions for pension or otherwise.
Net income	The income after deduction of tax and social security and Long Term Care figure but before deductions for pension contributions and other deductions, together with the value of any benefits as declared to the Tax Department.
Household income	The income of the parents if living together, or if the non-resident parent is not known or does not contribute to the maintenance of a child, the income of the resident parent and the income of the other adult in the household who is married to or the civil partner of the resident parent or is in a marriage like relationship with the resident parent It does not include the income of others in the household but any contribution by way of board and

	<p>lodging from any other person must be included.</p> <p>It also includes any income of the Student but not other children in the household.</p>
'Other adult'	Any person who has a residence order in relation to the child or who is who is married to or the civil partner of the resident parent or is in a marriage like relationship with the resident parent and has accepted the child as a child of the family unit
Student	The child in relation to which the application is made
Maintenance orders	<p>Includes all court orders whether in Jersey or another jurisdiction and includes all financial provision for a child including regular payments, agreements for the payments of expenses such as medical and dental expenses, school fees, uniform etc.</p> <p>It also includes any formal agreement entered into by the parents or others in relation to maintenance provision for the student</p>
The school	Victoria College or Jersey College for Girls

### **Who is eligible?**

As a guide total and gross parental/household income (including the income of the student) in excess of £48,000 would normally not enable a student to benefit from the majority of the Bursaries or scholarships outlined.

You will be asked to submit a form for each year that the student is in receipt of a bursary or scholarship.

### **Disclosure**

**Failure to disclose any material facts could result in withdrawal of the Bursary and possibly the demand for repayment of the fees already paid.**

It is a requirement that you inform the School of any material improvement in your circumstances of those of the student within 28 days of such a change. If your do not do so it could put the receipt of the bursary at risk.

## **Procedure**

1. This applies both to the first application and to the following years while the student is in receipt of a bursary or scholarship.
2. Both parents, or the resident parent and the Other Adult must complete all of the form. If the non resident parent is not contributing to the maintenance of the student and other children you must explain why, and explain the efforts made by you to obtain maintenance in the section at the end. If you have any doubts as to who should complete the form please contact the School.
3. If there is any reason why one of the parents or the other adult does not complete the form then reasons must be set out in the section at the end.
4. If there is no income please state 'NONE' in that section. If there is no outgoing please put '0'. If a section does not apply please say so.
5. Take the form to the Tax Department who will need to certify as correct the information you have provided in relation to your income. They can only do this if you have already sent in your tax return for the preceding tax year, so you must make sure that your return is submitted to the Tax Department as early as possible in January. Only forms which have been certified by the Tax Department will be considered by the school.
6. Please note that if it is likely that a Bursary is to be offered, then documentary evidence may be requested to verify any of the contents of this form.
7. The school must receive the first form by **6 February 2017**. If your child is already in receipt of a bursary or scholarship then the form must be returned by **20 February 2017**.
8. However, parents of students who suffer a financial setback during the academic year will be considered should the need arise at any time.

## **Access to information provided in this form**

**The information provided on this form is confidential and will only be used for the purpose of consideration of financial assistance, all processing will be carried out under the requirements of the Data Protection (Jersey) Law 1987. It will only be disclosed to others outside the Education Service and the Trustees of any Trust to which application is made if required by law.**

**Jersey College for Girls  
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**The student**

Surname	
First names	
Date of birth (please attach copy of birth certificate if first application)	
Place of birth	
Current school year	
Present school	

**Mother**

Surname	
First names	
Address	
Telephone contact (Daytime)	
Telephone contact (evening)	
Email contact address	
Occupation	
Employer	
Status (single, married, or Civil partner, in a partnership, separated or divorced from other parent.)	

**Father**

Surname	
First names	
Address	
Telephone contact (daytime)	
Telephone contact (evening)	
Email contact address	
Occupation	
Employer	
Status (married, or Civil partner, separated from other parent, single)	

**Other adult**

Surname	
First names	
Address	
Place in the household and or relationship to student (if any) e.g. residence order, wife or husband of resident parent, civil partner, partner	
Telephone contact	
Email contact address	
Occupation	
Employer	

**Children or children of the family (including the Student) who live with each of the parents or who remain in education and who are maintained by the parent concerned**

**Mother**

Name of child	Date of Birth Day Month Year	School/place of further education attended or to be attended	Gross income of child for last calendar year	Office Use

Is there any provision in any maintenance agreement or trust fund or otherwise for the payment of capital income or contribution or payment of school fees for the student? If so please provide details.

Is there a maintenance order in place for the student? If so please provide a copy of the order (s). (appropriately edited)  
If payments are not being made, please provide reasons why not and details of attempts to obtain payment.

**Father**

Name of child	Date of Birth Day Month Year	School/place of further education attended or to be attended	Gross income of child for last calendar year	Office Use

Is there any provision in any maintenance agreement or trust fund or otherwise for the payment of capital, income or contribution or payment of school fees for the student? If so please provide details.

**Other adult**

Name of child	Date of Birth Day Month Year	School/place of further education attended or to be attended	Gross income of child for last calendar year	Office Use



## Income

Total income of both parents/partner from all sources (earned and unearned) for the year ending **31 December 2016**

If you know that income this year will be significantly less than that indicated please explain why on the back page.

Please ask the Comptroller of Income Tax to complete the certificate shown below before returning the form to Jersey College for Girls.

INCOME	Mother	Father	Other adult	OFFICE USE
1. (a) Salary or wages (including gratuities, overtime, bonus or commission (gross and net of ITIS/Income Tax and Social Security) and value of benefits in kind				
(b) Any additional part-time work, etc. (gross)				
2. Profession, business or trade (gross and net of IT IS/Income Tax and Social Security) averaged over the last three years.				
3. Bank interest, interest from stock, mortgages or investments of any kind (gross)				
4. Letting of property net of expenses				
5. Net income from paying guests/lodger./ other members of the household be way of board and lodging				
6. State benefits (please specify)				
7. Pension or annuity (State source from which received) and whether paid gross or net of tax				
8. Payment of Maintenance				
9. Any other income Please give details)				
<b>Totals</b>				

### INCOME TAX CERTIFICATE

The income details in items 1-9 above, unless separately initialled, have been agreed for tax purposes.

Verified by: .....  
 INCOME TAX Department (Print name)

Date: .....

Stamp of Income Tax Department

## Assets

(i.e. value of property(s) whether in Jersey or elsewhere and whether occupied or rented out. The amount of outstanding mortgage. Other valuable Assets, investments, bank balances, etc. Please provide an estimate of value of each item – continue overleaf if necessary)

<b>Mother</b>	
Property Address	
Gross value of property	
Any other property owned by you	
Net equity after payment of mortgage	
Cash in bank	
Stocks, shares and other assets including any beneficial interest in an asset or trust	
Ownership of any company	

<b>Father</b>	
Property Address	
Gross value of property	
Any other property owned by you in any jurisdiction	
Net equity after payment of mortgage	
Cash in bank	
Stocks, shares and other assets including any beneficial interest in an asset or trust	
Ownership of any company	

### Other adult

Property Address	
Gross value of property	
Any other property owned by you	
Net equity after payment of mortgage	
Cash in bank	
Stocks, shares and other assets including any beneficial interest in an asset or trust	
Ownership of any company	

**OUTGOINGS –**

Set out below the reasonable future **MONTHLY** income needs of yourself and of any children living with you.

INCLUDE: (i) All income needs for yourself (ii) Current income needs for any children living with you or provided for by you only if these form part of your total income needs (e.g. housing, fuel car expenses, holidays, etc)

	<b>Resident parent or Household</b>	<b>Non resident parent</b>	<b>Other adult ( if different from resident parent )</b>
Income tax if not deducted from Salary/wages			
Mortgages and equity release loans			
Mortgage Protection Policy			
Rent (full amount)			
Parish Rates			
Other insurances			
Pension contributions			
Other deductions from salary			
House/contents/insurance			
Repairs / decoration			
Gas			
Electricity			
Heating oil			
Water rates			
Telephone (including broad band etc.)			
Mobile telephone			
Public transport			
Car repairs/servicing/insurance			
Petrol/diesel			

	Resident parent or Household	Non resident parent	Other adult ( if different from resident parent )
Food / household items			
Private health insurance			
Animal expenses			
Insurance policies			
Hobbies including gym and other memberships			
Doctor / Dentist / Optician			
<b>SUB TOTAL</b>			£ .....
<b>CHILDREN</b>			
Include only those income needs that are different to those of your household shown above			
Childcare / Childminder			
Nursery / school fees			
Contribution to further education by way of tuition fees or maintenance			
Clothing and shoes			
Travel to school			
School trips			
Doctor / Dentist/optician			
Holiday child care			
<b>Sub Total</b>			£ .....
<b>Total Income Needs</b>			£ .....

	Resident parent or Household	Non resident parent	Other adult ( if different from resident parent )
If your income needs are likely to change in the near future, explain the anticipated changes			

**Any other information you think is relevant in support of this application**

**UNDERTAKING**

In the event of the Trust awarding a bursary or scholarship in connection with the attendance of my/our child at the School on Page 1, I/we understand that my/our child is expected to complete his/her education to the age of 18 years..

I/we agree that should s/he fail for any reason to attend school for any part of any term in the period covered by the award, or should I/we cease to reside in Jersey, I/we will notify the Trust.

I/we also undertake to inform the Trust of any change in my/our financial circumstances.

I/we accept that I/we will have to complete an annual disclosure of my/our full financial circumstances for my/our child to be considered for a continuation of the Bursary or scholarship.

Signed..... (Parent)

Date.....

Signed..... (Parent)

Date.....

Signed..... (Other Adult)

Date.....

**THE COMPLETED FORM SHOULD BE SENT TO THE COMPTROLLER OF INCOME TAX, CYRIL LE MARQUAND HOUSE, ST HELIER, JE4 8PF FOR CERTIFICATION, AFTER WHICH IT SHOULD BE RETURNED TO VICTORIA COLLEGE, MONT MILLAIS,ST SAVIOUR JE1 4HT OR JERSEY COLLEGE FOR GIRLS, LE MONT MILLAIS, ST SAVIOUR JE2 7YB MARKED CONFIDENTIAL.**