

Application for 16-19 Discretionary Bursary Fund

Academic Year 2022 - 23

Financial Assessment Form

Section 1:

1.1 Student/Learner Details

Surname
First name(s)
Gender (M / F)
Date of Birth (dd/mm/yyyy)
Age on 1 September 2022
Student must be under 19 in the academic year in which you start your study.

1.2 Address Details

Home Address
Postcode
Home telephone number
Mobile telephone number

1.3 School Details

1.4 Course Details

1.5 Payment

Where possible **Tadcaster Grammar School** will purchase equipment, i.e. books on behalf of the student, other payments will be made direct to Departments for trips and Examinations Office for exam resits on your behalf. **Refunds are made by BACS direct to bank accounts. No cash payments are made.**

Section 2: Parent to complete:

2.1 Financial Information

If student(s) are in receipt of Free School Meals for the relevant Academic Year, you do not need to provide further financial information in the Financial Assessment section. (Confirmation will be made with the relevant Authority)

However, where you may be eligible to receive an award of £1,200/year as a member of a named vulnerable, you will need to provide Entitlement evidence to support that claim related to certain benefit categories below.

2.2 Household Members (Living at same address of student)

	Person 1	Person 2
Surname		
First name(s)		
Address		
Relationship to Learner		
Telephone		

2.3 Financial Assessment – Household Income (Maximum £28,000)

Person 1	Are you employed? (Yes / No) If yes, please submit P60 for details
Person 2	Are you employed? (Yes / No) If yes, please submit P60 for details

*If you are not employed please tick the relevant boxes to indicate the benefit(s) you receive and **provide the necessary evidence.***

Benefit received	Income Support	Job			Housing Benefit	Council Tax Benefit
		Employment Seekers Allowance	Incapacity Benefit	Carer's Allowance		
Person 1						
Person 2						

2.4 Financial Assessment – Other Income

*Please tick the relevant boxes to indicate all other income received into the household and **provide the necessary evidence.***

Other Income	Working Tax Credit	Child Tax Credit	Child Benefit	Grants or Bursaries etc	Any other income / benefit – please specify
Person 2					
Applicant					Disability Living Allowance Employment Support Allowance

Section 3: 3.1 Evidence

Whatever you have declared in 2.3 and 2.4 above must be backed up by evidence (photocopies accepted) in order for an assessment to be made.

The tables below show the evidence you will need to provide with your application form.

Once you have declared and identified your benefits on the application, find the 'Type of Income' that applies to you in the first column and the 'Evidence Required' column will tell you what you need to provide.

Type of Income	Evidence Required
Annual Salary	P60 for relevant tax year,
Income Support	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Job Seekers Allowance	Entitlement / Award letter – dated within the last 3 months from Sep of new Academic Year
Disability Living Allowance	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Employment Support Allowance	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Incapacity Benefit	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Carer's Allowance	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Housing Benefit	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Any other benefit	Entitlement / Award letter – dated within the last 3 months from Sept of new Academic Year
Working Tax Credit	Working Tax Credit Award Notice relevant year. Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Tax Credit	Working Tax Credit Award Notice relevant year. Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Benefit	Award letter (Award Notice relevant year)

Grants or bursaries etc Relevant paperwork detailing entitlement and amount paid

Any other income Relevant paperwork

4.1 Declaration

Please read the declaration below and read carefully before signing:

1. I declare that the statements made on this form are true and to the best of my knowledge and belief are correct in every respect. I undertake to supply any additional information that may be required to verify the particulars given. I understand that if I refuse to provide information relevant to my claim the application will not be accepted. I also undertake to inform the school of any alteration to any of the particulars in writing. I agree to repay the school in full and immediately any sums advanced to me if the information I have given is shown to be false or deliberately misleading.

2. I am aware that the funding covers only this school year and that I must reapply next year; there is no guarantee that I will receive funding for future years even if I am eligible for the current year.

Signed (Learner) Date **Print Name**

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Signed (Person 1 or 2) Date **Print**

Name/Parent/Guardian