

Application to 16-19 Bursary Fund 2011/12

Financial Assessment Form

1.1 Learner Details

Surname / Family name	
First name(s)	
Sex (M / F)	
Date of Birth (dd/mm/yyyy)	
Age on 31 st August 2011	
You must be aged 16, 17, or 18 on 31 st August 2011 to apply.	

1.2 Address Details

Home Address	
Postcode	
Home telephone number	
Mobile telephone number	
E-mail address	
Have you been resident in the UK for 3 years or more?	

1.3 School Details

Name of school	
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1.4 Your Bank or Building Society account details

This should be the name as it appears on your cash or debit card, or statement

Full name of Account Holder	
Name of Bank / Building Society	
Branch	
Sort Code	
Account Number	

2.1 Financial Information

Are you and / or your sibling(s) in receipt of free school meals?	Yes / No
Sibling Name(s)	

If you, or your siblings, are in receipt of Free School Meals, you do not need to provide further financial information in the Financial Assessment section.

2.2 Household Members

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

2.3 Financial Assessment – Income

To be completed by the person(s) responsible for the household bills

Person 1	Are you employed? (Yes / No) or Are you self employed? (Yes / No)	If yes, please submit P60 for details If yes, please submit Self assessment tax calculation form (SA302).
Person 2	Are you employed? (Yes / No) or Are you self employed? (Yes / No)	If yes, please submit P60 for details If yes, please submit Self assessment tax calculation form (SA302).

If you are not employed please tick the relevant boxes to indicate the benefit(s) you receive.

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

2.4 Financial Assessment – Other Income

Please tick the relevant boxes to indicate all other income received into the household

Other Income	Working Tax Credit	Child Tax Credit	Child Benefit	Grants or Bursaries etc	Any other income / benefit – please specify
Person 1					
Person 2					

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 tax year 2010-11, or week 52 (last week in March 2011) payslip or month 12 (March 2011) payslip
Income Support	Entitlement / Award letter – dated within the last 3 months
Job Seekers Allowance	Entitlement / Award letter – dated within the last 3 months
Incapacity Benefit	Entitlement / Award letter – dated within the last 3 months
Carer's Allowance	Entitlement / Award letter – dated within the last 3 months
Housing Benefit	Entitlement / Award letter – dated within the last 3 months
Any other benefit	Entitlement / Award letter – dated within the last 3 months
Working Tax Credit	Working Tax Credit Award Notice marked "2011-12". Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Tax Credit	Working Tax Credit Award Notice marked "2011-12". Must be for full year and not partial awards (FULL AWARD NOTICE)
Child Benefit	Award letter
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 re-apply 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

Signed (Person 1 or 2) Date

For School use:	Date Received:
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Authorised By:

Date: