



### **BURSARY PREPARATION WORKING SHEET**

All income and expenditure should be annual; however, you can use the calculators within the form if you find it easier to think in weeks or months for particular income or expenditure.

<b>ASSETS:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Family Home	Valuation	£	Describe the basis of your valuation
Rent paid	£	Annually/Monthly/ Weekly	Rent book/ tenancy/ statement
Mortgage Capital repayments	£	Annually/Monthly/ Weekly	Mortgage statement
Mortgage Interest Repayments	£	Annually/Monthly/ Weekly	Mortgage statement

Second home/property	Valuation	£	
Property abroad	Valuation	£	
Rental income	£	Annually/Monthly/ Weekly	
Mortgage capital repayments	£	Annually/Monthly/ Weekly	
Mortgage interest payments	£	Annually/Monthly/ Weekly	
Other allowable expenditure (per tax return)	£	Annually/Monthly/ Weekly	

Balance on current accounts		£	3 months of statements including all business accounts
Balance on deposit accounts		£	3 months of statements including all business accounts

Value of shares and equities		£	Statements with basis of valuation
Endowment life insurance policies		£	Annual statement
Motor vehicles		£	
Interest in trusts		£	Trust documents
Declared insurance items		£	
Other assets		£	Provide assets

<b>LIABILITIES</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Bank overdraft		£	3 months of statements including all business accounts
Bank charges	£	Annually/Monthly/ Weekly	

Credit card debt		£	3 months of statements for all cards
Minimum repayment	£	Annually/Monthly/ Weekly	

Finance Leases		£	Lease agreement
Repayment	£	Annually/Monthly/ Weekly	

Family loans		£	Provide details/loan agreement and nature of your relationship
Repayment	£	Annually/Monthly/ Weekly	

Commercial loans		£	Loan agreement
Repayment	£	Annually/Monthly/ Weekly	

Other borrowings		£	Provide details and evidence of the borrowings
Repayment	£	Annually/Monthly/ Weekly	
Debt management/IVA repayments	£	Annually/Monthly/ Weekly	Provide evidence of agreements

School fee arrears		£	
--------------------	--	---	--

<b>INCOME:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Bank overdraft		£	3 months of statements including all business accounts
Bank charges	£	Annually/Monthly/ Weekly	

Credit card debt		£	3 months of statements for all cards
Minimum repayment	£	Annually/Monthly/ Weekly	

Finance leases		£	Lease agreement
Repayment	£	Annually/Monthly/ Weekly	

Family loans		£	Provide details/loan agreement and nature of your relationship
Repayment	£	Annually/Monthly/ Weekly	

Commercial loans		£	Loan agreement
Repayment	£	Annually/Monthly/ Weekly	

Other borrowings		£	Provide details and evidence of the borrowings
Repayment	£	Annually/Monthly/ Weekly	
Debt management/IVA repayments	£	Annually/Monthly/ Weekly	Provide evidence of agreements

School fee arrears		£	
--------------------	--	---	--

<b>INCOME:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Salary	£	Annually/Monthly/ Weekly	P60, recent payslip, March payslip
Benefits in kind	£	Annually/Monthly/ Weekly	P11d
Pensions received	£	Annually/Monthly/ Weekly	P60, recent payslip, March payslip
Gratuities or lump sums	£	Annually/Monthly/ Weekly	Contract/P60/Tax return/Other

Dividend income		£	Dividend confirmation
Business profits from a Limited company (after corporation tax and dividend distributions)		£	Accounts
Business profits from sole trader or partnership		£	Accounts and tax return

Other investment income	£	Annually/Monthly/ Weekly	Available documentation
Trust income	£	Annually/Monthly/ Weekly	Trust deed, correspondence
Capital gains	£	Annually/Monthly/ Weekly	Tax return
Building society, bank and other interest	£	Annually/Monthly/ Weekly	
Maintenance and alimony	£	Annually/Monthly/ Weekly	

Child benefit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Child tax credit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Working tax credit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Disability benefit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Carers benefit	£	Annually/Monthly/ Weekly	Annual letter of entitlement

<b>INCOME:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Housing benefit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Council tax benefit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Universal credit	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Job seekers allowance	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Employment & support allowance	£	Annually/Monthly/ Weekly	Annual letter of entitlement
Other benefits	£	Annually/Monthly/ Weekly	Annual letter of entitlement

Any other income	£	Annually/Monthly/ Weekly	Provide details with available documentation
Any other income	£	Annually/Monthly/ Weekly	Provide details with available documentation
Any other income	£	Annually/Monthly/ Weekly	Provide details with available documentation

<b>TAXATION:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Income tax on employment (PAYE)	£	Annually/Monthly/ Weekly	P60 (already supplied above)
Income tax on self assessment	£	Annually/Monthly/ Weekly	Self assessment tax return (already supplied above)
Capital gains tax	£	Annually/Monthly/ Weekly	Self assessment tax return (already supplied above)
National insurance	£	Annually/Monthly/ Weekly	Already supplied
Student loan repayments	£	Annually/Monthly/ Weekly	Annual statement or payslips

<b>EXPENDITURE:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Council Tax	£	Annually/Monthly/ Weekly	Council tax bill

<b>TAXATION:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Water rates	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Gas & electricity	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Home insurance	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Food	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Clothing	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Telephone/broadband (mobile and landline)	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
TV	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Medical	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Pet expenses	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Other household expenditure	£	Annually/Monthly/ Weekly	Provide details/a breakdown

Motor fuel	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Road tax	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Servicing & MOT	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Motor vehicle insurance	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense

Breakdown cover	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Parking	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Public transport	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Other vehicle and travel expenditure	£	Annually/Monthly/ Weekly	Provide details/a breakdown

Maintenance and alimony	£	Annually/Monthly/ Weekly	Court papers where not paid to the child's parent
-------------------------	---	-----------------------------	---

<b>EXPENDITURE:</b>		<b>Annually/Monthly/ Weekly (Circle which is Appropriate)</b>	<b>Documentation/evidence required</b>
Pension contributions	£	Annually/Monthly/ Weekly	Either: March and current payslip/ tax return/ annual pension statement
Personal expenditure (not including tutoring, school fees or clubs for children)	£	Annually/Monthly/ Weekly	Provide details/a breakdown

**The following information has to be given for each dependent child:**

Annual school fee		£	
Compulsory extras on school bills		£	
Scholarships/bursaries and other allowances provide by school/college/university		£	
Assistance from other sources e.g. trusts/ employers/ family/ grants		£	
Tutoring and music lessons	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Clubs and activities	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Childcare costs	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense
Annual income of child	£	Annually/Monthly/ Weekly	No evidence required unless you wish to do so to support a large expense

What level of support are you requesting?

How much do you feel you can pay towards fees and what steps have you taken to maximise your income and reduce your outgoings to achieve this?