

CONFIDENTIAL

TO PEMBROKE HOUSE, PO BOX 31, GILGIL KENYA

**Confidential Statement of Financial Circumstances
in support of an application for a Bursary**

This questionnaire is in the form recommended by the Independent Schools Bursars' Association

1. CHILD

(a) Full Names.....

(b) Date of Birth.....

2. PARENTS

Father/Step-father

Mother/Step-mother

(a) Names

(b) Style or Title

(c) Address(es)

.....

.....

(d) Occupation(s)

(e) Day time Tel. No.....

3. TAXABLE INCOME

(Please enter below your current earning and expected income from all sources for this tax year).

Father *Mother*

(a) Gross Salary and other similar earnings (Including all Taxable benefits and other emoluments)

(b) Profits of business or profession

(c) Gross pension, retired pay, widow's pension, etc.

(d) Gross investment income from dividends, interest, Ground rents etc.

(e) Government Allowances/Social Security payments

(f) Any other income, gratuities or lump sum payments (please give details)

NOTE: YOU ARE ASKED TO PROVIDE PROOF OF INCOME BY WAY OF AN INDIVIDUAL TAX RETURN (I.T. 1 FORM)

4. OTHER EMOLUMENTS

	<i>Father/ Step-father</i>	<i>Mother/ Step-mother</i>
(a) Value of board and/or residence or other non-taxable Benefits in kind provided free by reason of employment
(b) Child allowances
(c) Maintenance payments received
(d) Any other non-taxable emoluments or income <i>(give details please)</i>

5. OUTGOINGS

(a) Tax payable on Incomes declared above <i>(including tax deducted at source)</i> .....	.....	.....
(b) Insurance contributions .....	.....	.....
(c) Mortgage interest <i>(state interest only and not installments of mortgage repaid)</i> .....	.....	.....
(d) Any other interest payable <i>(please specify)</i> .....	.....	.....
(e) Any Annual rent payable on home .....	.....	.....

6. CAPITAL ASSETS

(a) Approximate value of all Investments .....	.....	.....
(b) Approximate value of house <i>(if owned)</i> .....	.....	.....
(c) Approximate value of other possessions including contents of house, motor cars etc. ....	.....	.....
(d) Cash at banks or elsewhere <i>(include current and deposit accounts)</i> .....	.....	.....
(e) Approximate value of any other assets <i>(please specify)</i> <i>including the market value of any Insurance Policies maturing in this tax year</i> .....	.....	.....
(f) Approximate market value of any second property owned, Either at home or abroad .....	.....	.....

7. CAPITAL LIABILITIES

(please give details of any capital charges against the assets declared in Section 6)

(a) Mortgage – amount outstanding .....	.....	.....
(b) Overdraft at bank .....	.....	.....
(c) Other loans .....	.....	.....

8. DEPENDENT CHILDREN

*(include the child to whom this application refers:
if more than 4 children, give details on a separate sheet)*

	1	2	3	4
(a) Forename
(b) Date of Birth
(c) Sex
(d) School or College
(e) Boarding or Day
<hr/>				
(f) Annual school or other educational fees <i>(excluding extras and sundry disbursements)</i>
(g) Compulsory additional school Charges
(h) Amount of fees shown in (f) covered by:				
(i) Scholarships, Bursary or Allowances given by school
(ii) Annual sum arising from capital prepayment scheme
(iii) Other Bursaries or Grants
(iv) Services/company Allowances (gross) State whether the sum has been included in gross salary 3(a)
(v) Annual sum arising from Educational Insurance Policies
(iv) Assistance from any other source e.g. Grandparents, trusts, settlements, Government Assisted places scheme, etc. <i>(please specify)</i>
(i) Annual income of child <i>(if any)</i>

9. OTHER DEPENDANTS
(Please give details)

10. ANY OTHER RELEVANT INFORMATION

11. CERTIFICATE

I/We have made a complete statement of my/our financial situation and circumstances generally. I/We undertake to renew this statement annually and in any case to report immediately any material change in the financial position detailed. I/We also give any expressed authority to approach our Bankers as indicated below to verify any information contained here.

Date: Signature.....
(Father/Step-father)

Date:..... Signature.....
(Mother/Step-mother)

Note:- Please also note and complete the question below.

Please seek their permission to be used as referees before adding their names, addresses, email, and telephone numbers.

12. PERSONAL REFEREES
(1.)

(2.)

BANK REFEREES

ASSISTANCE FROM OTHER SOURCES

In order to help the greatest number of parents who need financial assistance, all those who apply for a bursary from the school are asked first to enquire if they are eligible for assistance from any other source.