



Confidential Bursary Application Form The Giving Tree Foundation

This application is for children who are in need of a Bursary that covers the £47,000.00 intensive home therapy programme (Monday – Friday), as a way of treating Autism Spectrum Disorder (ASD). The Bursaries are aimed towards children aged 3- 5 years in either London or Birmingham. Please note, that in accordance to UK YAP’s guidelines, we are not able to offer bursaries to children who also suffer from epilepsy. Before completing this application, please refer to the guideline notes on pages 14-18.

1. CHILD

a.	Name	
b.	Date of Birth	
c.	Severity of Autism	

Any other medical conditions:

2. PARENT/GUARDIAN CONTACT DETAILS

		Father/Step Father/Partner	Mother/Step Mother/Partner
a.	Names		
b.	Title		
c.	Address		
d.	Post Code		
e.	Daytime Phone Number		
f.	Evening Phone Number		
g.	Mobile		
h.	E-mail Address		

3. PARENTS'/GUARDIANS' OCCUPATIONS

a.	Employed (complete employer's address and phone number)		
b.	Self Employed (complete type of business)		
	Are you a Director or Shareholder or Proprietor of this Company or Business?	Yes / No	Yes / No
	If 'Yes' state proportion of		

	Company or Business you and/or your spouse/partner own		
c.	Unemployed		
d.	Retired		

4. INCOME

		Father/Step Father/Partner	Mother/Step Mother/Partner
a.	Gross Salary and other emoluments (including all taxable benefits and expenses)		
b.	Taxable profits of trade or profession for the last two accountable periods	a. b.	a. b.
c.	Gross pension, widow's pension, State pension, etc.		
d.	Gross investment income from:		
	→ Building Societies/Banks		
	→ Dividends and interest (other securities)		
e.	Gross rental profit		
f.	Social Security benefits		

	(including Child Benefit and Child Tax Credits)		
g.	Separation or Maintenance Allowance		
h.	Is there a Court Order/Separation Agreement? If 'Yes', please state annual amount payable for living fees	Yes / No	Yes / No
i.	Benefits in Kind provided free by reason of employment not already included in (a) above		
j.	Any other income or gains not included in (a) to (i) above. Eg: trust or estate income, gains on sale of capital assets, surrenders of life assurance policies, etc.		

k. Please send a copy of your self-assessment tax calculation for the previous year.

5. OUTGOINGS

a.	Tax payable Incomes above <i>(including tax deducted at source)</i>		
b.	National Insurance Contributions		
c.	Pensions or superannuation		

	interests (net)		
d.	Mortgage repayments <i>(include capital repayment as well as interest)</i>		
e.	Endowment mortgage insurance		
f.	Any other interest payable eg. overdrafts, credit cards, loans, etc. <i>(please specify)</i>		
g.	Annual landlord rent payable on principal residence		
h.	Other commitments <i>(please specify)</i>		

6. CAPITAL ASSETS

		Father/Step Father/Partner	Mother/Step Mother/Partner
a.	Approximate market value of all investments		
	→ Building Society/Bank deposits/National Savings accounts		
	→ Equity investments		

	(shares, unit trusts, corporate bonds, and other securities) and Government stocks		
	→ PEPs, ISAs, TESSAs, TOISAs		
	→ Life assurance bonds and policies including endowments		
b.	Approximate market value of principal residence <i>(freehold or leasehold)</i>		
c.	Approximate market value of other possessions. Including: house contents, car, collections, paintings, jewellery, etc.		
d.	Cash at banks or elsewhere <i>(current accounts only)</i>		
e.	Approximate market value of any other assets <i>(please specify and include the market value of an Insurance Policies maturing in this tax year or the last five years)</i>		
f.	Net worth/value of any business		

	which you own or share		
g.	Approximate market value of your interest in any other property, land or buildings, either at home or abroad		
h.	Redundancy or other termination payments		
i.	Monies that are owed to you		
j.	Other assets not listed. Eg. share options, trust interests/assets held on your behalf by a third party, assets likely to be received in the foreseeable future, etc.		

7. CAPITAL LIABILITIES

Please give details of any capital charges against the assets declared in Section 6

		Father/Step Father/Partner	Mother/Step Mother/Partner
a.	Mortgage details		
	→ Amount outstanding on principal residence		
	→ A final payment date		
b.	Other liabilities <i>(please specify)</i>		

8. NET ASSETS

	TOTAL ASSETS (6)		
	LIABILITIES (7)		
	NET ASSETS (6-7)		

Please explain any reasons why net assets cannot be converted or utilised to pay for an ABA programme:

9. DEPENDENT CHILDREN

Include the child to whom this application refers: if more than four children, give details on a separate sheet

**The details requested with regard to the fees payable and grants on behalf of your other children are for information purposes only, and will not be taken into account in the assessment of the Bursary awarded*

		1	2	3	4
a.	Forename				
b.	Date of Birth				
c.	School or College				
d.	Boarding or Day				
		£	£	£	£
e.	Annual or other educational fees <i>(excluding extras and sundry disbursements)</i>				
f.	Compulsory additional school charges				
g.	Amount of fees shown in section (e) covered by:				
	→ Scholarships, Bursaries, or other allowances given by school				
	→ Annual sum arising from capital repayment scheme				
	→ Services/ Diplomatic/Company Education Allowances (gross) <i>(state whether sum has been included in gross salary at 3(a))</i>				
	→ Annual sum arising from Educational Insurance Policies				

	→ Assistance from any other sources. Eg. grandparents, trusts, charities, etc. <i>(please specify)</i>				
h.	→ Annual income of child <i>(if any)</i>				
	→ Capital Value of Trust				

10. OTHER DEPENDENTS

Please give details

11. VERIFICATION OF INCOME

Please enclose documentary evidence in support of the income figures disclosed in Section 3.

Please tick those you are enclosing.

	P60 and P11D		Copy of HMRC tax calculation issued under Self Assessment	
	March Pay Advice		Confirmation of Schedule D self employment income from an independent accountant	
	Reports and Accounts (including Balance Sheet) for the years			
	Others (<i>please specify</i>)		Eg. copies of dividend vouchers, bank interest certificates	

12. VERIFICATION OF ASSETS

Please enclose documentary evidence of capital assets and tick those you are enclosing.

	Property Valuation		Investment Portfolio Valuation	
		£		£
	Mortgage Statement		Contents Insurance	
		£		£

13. HOME VISIT

The Giving Tree Foundation may wish to visit you at your home address in order to discuss your application for support. Please indicate, by ticking the box as appropriate, whether you are happy to receive a visit from the Charity's representative.

YES / NO

14. ASSISTANCE FROM OTHER SOURCES

In an effort to help the greatest number of parents and children who need financial assistance, all those who apply for Bursaries are asked to first enquire if they are eligible for assistance from any other source.

Please state whether you have applied to any other foundations or trusts for a grant, and if so to which and with what result. Tick as appropriate.

YES / NO

ANY ADDITIONAL INFORMATION

14. DECLARATION

After having read the notes provided, the following declaration must be signed by the parents/guardians:

We/I have read the notes and have made a complete and accurate declaration of our/my income and assets.

We/I understand that if we/I are/am offered a Bursary for our/my child and accept a place for him/her within your Charity, the following terms and conditions will apply between ourselves/myself and the Charity:-

a) Subject to the Family complying with its obligations in the Bursary Agreement, The Giving Tree Foundation shall pay the Bursary directly to UK YAP on behalf of the family, in monthly installments in advance. The Family agrees and accepts that payment of the Bursary installments can only be made to the extent that The Giving Tree Foundation has funds available;

b) Award of a Bursary is subject to renewal at an annual basis, only if it is subsidised by the LEA or another sponsor, and following an annual review where the Family must complete a declaration of its financial circumstances. The Giving Tree Foundation reserves the right to reject the annual renewal of a Bursary Award;

c) We/I will report immediately any material change in the financial position declared;

d) The Bursary may be withdrawn or reduced if:

- i) We/I act or our/my child acts in breach of the Charity's Terms and Conditions attached to the Acceptance Form for our/my child at the programme;
- ii) We/I have failed to return the annual declaration of our/my financial circumstances by the return date indicated;
- iii) We/I have failed to produce any additional information required by the Charity to evidence our/my financial circumstances;
- iv) In the opinion of the Trustees, our/my child's attendance, progress or behaviour no longer merits the continuation of the award;
- v) We/I are more than [28] days in arrears in respect of any amount due and owing to the Charity;
- vi) There is a material change in our/my financial circumstances;
- vii) The Charity's resources are insufficient to maintain the level of award.

Signatures:

Parent/Guardian* _____ Date _____

Parent/Guardian* _____ Date _____

GUIDEANCE NOTES FOR COMPLETION OF BURSARY APPLICATION FORM

Before completing the form, please read these notes carefully, and contact The Giving Tree Foundation at bursaries@thegivigntreefoundation.co.uk if further information or advice is required. These notes refer to the corresponding paragraph on the Form.

The Giving Tree Foundation reserves the right to seek any other documentary evidence in support of the income and asset figures submitted, and to make enquiries which it deems necessary.

All financial values should be shown in Sterling. References to Her Majesty's Revenue & Customs (HMRC) include the relevant national Taxation Authority.

1. PARENTS/APPLICANTS

These are defined as:

- The natural father and mother of the child where they live together (whether or not they are married to each other) and the child normally resides with them both in the same household; or

- The parent of the child with whom the child normally resides and the partner (if any) of that parent where the partner normally resides with that parent and the child in the same household; or

- The child's guardian appointed in accordance with Section 5 of the Children's Act 1989 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with that guardian and the child in the same household; or

- The person with whom the child resides in accordance with either:
 - i. A subsisting residence order made under section 8 of the Children Act 1989;
or
 - ii. Any subsisting court order (other than a residence order) which specifies who is to have actual custody or care and control of the child; or

- Where a child either has no parents as defined above or the Charity is satisfied that no such parents can be found, and he is either looked after by a local authority or provided with accommodation within the meaning of section 105(1) of the Children Act 1989, the child shall be treated as one whose parents have no income for the purposes of the scheme; or

- Where none of the above applies, the parent is the person with whom the child normally resides in accordance with any informal care or fostering arrangement and

that person's partner (if any) where the partner normally resides with that person and the child in the same household.

· If parents are separated or divorced before or during their child's application to the Charity, both mother and father will require to complete and sign the Application Form.

2. INCOME

a) The gross annual amount of salaries and wages, including any earnings from profit related pay, part-time employment and any sum received as bonus, commission etc, statutory sick pay, statutory maternity pay giving

GROSS amounts (before deduction of tax, NI, superannuation, etc) for the current or latest financial year. Taxable benefits in kind agreed with HMRC should also be shown (free or subsidised housing, meals, petrol, cars, etc) – at the amount agreed for taxable purposes.

b) Profits from a business or profession – at the amount of GROSS income agreed by HMRC or relevant tax authority for the year in question (deductions should be made only in respect of capital allowances). Copies of the latest set of accounts should be included.

c) All other Investment income (eg interest or National Savings Bank deposits; dividends, annuities etc) should be entered GROSS of tax. If tax was deducted at source, parents should add in the amount of tax paid or tax credit notified. Building Society interest must be disclosed GROSS.

d) All social security benefits received should be declared and type of benefit specified.

e) All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

f) Enter income from letting or subletting of property at the amount of the NET profit agreed with HMRC; and royalties and all other sources including entertainment and travel allowances etc.

3. OUTGOINGS

a) Enter Income Tax and tax on unearned income SEPARATELY.

b) Enter annual superannuation contribution of (if applicable) payments to other Pension Schemes.

c) Enter capital as well as interest payment on a mortgage for the principal residence.

- d) Only complete this if repayment is effected by means of a full Endowment Policy.
- e) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).
- f) Enter annual rent (if applicable)
- g) Other commitments must be specified/listed as total annual outgoings on the continuation sheet on page 11; to provide an annual figure simply multiply the weekly amount by 52 (eg. Weekly food: £yy x 52 + amount on food per year). These other commitments will likely include:
- Council tax
 - Water rates
 - Utility bills
 - Interest on loans
 - Food
 - Clothes
 - Maintenance payments
 - Charitable donations
 - Car costs
 - Holiday costs

4. PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the Charity takes account of the following assets:

- a) The capital sum of any monies on deposit with any bank, deposit taker or building society. Investments in stocks and shares valued as near as possible to the date of submitting the application form.
- b) The current market value of your principal residence. The current market value should be estimated by parents where a current valuation is unavailable.
- c) If you run your own business or are partners in a business, then you should show the net worth of the business. Shares in a company not listed on a stock exchange should be valued at the relevant proportion of the net value of the company.
- d) In the case of second homes and/or other properties, these should also be included at their estimated current market value; no allowance will be made for any outstanding mortgage.

5. PARENTS'/APPLICANTS' CAPITAL LIABILITIES

Details of other liabilities should be provided along with the lender.

6. DEPENDENT CHILDREN

Use column number 1 for the child for whom you are now applying at his/her potential Bursary. Enter in other columns any other of your children who are unmarried and at a school, university or other educational institution which attracts a county grant.

a) The figures to be inserted here refer to the current academic year.

b)

- (i) Members of HM Forces and Diplomatic Service should include the amount of any Education Allowances which they receive. Parents in other occupations should include any similar sum.
- (ii) Where a Trust has been established in favour of the child (whether alone or jointly with others) for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.

c) Where the child has any unearned income, eg interest from National Savings, bank or building society deposits, or receives share dividends, you should enter the source of income and the gross amount received before deduction of any tax. You should enter the capital value of any beneficiary or other trust set up for each child.

7. OTHER DEPENDENTS

If you qualify for a Carer's Allowance, or have an aged grandparent or relative living with you or dependent upon you, please provide details including age, address, condition, etc.

9. ANY OTHER RELEVANT INFORMATION

Please enter, on a separate sheet if necessary, any details which may affect the assessment of a Bursary, eg a significant change in income or outgoings for the coming year.

10. CONFIDENTIALITY

The Giving Tree Foundation respects the confidentiality of Bursary awards made to families and recipients are expected to do likewise.

11. DATA PROTECTION

By signing and/or submitting this questionnaire (Confidential Statement of Financial Circumstances in support of an application for a Bursary) the Parents or Guardians

on behalf of themselves and so far as they are able on behalf of the Child authorize The Giving Tree Foundation and as far as it is necessary, or as required by law, any group company, or any advisor to The Giving Tree Foundation, to process personal information including personal information, financial information and sensitive personal information as is deemed necessary for the legitimate purposes of The Giving Tree Foundation.

12. ADDRESS FOR CORRESPONDENCE

Upon completing all necessary requirements for the Bursary Application, please e-mail The Giving Tree Foundation at bursaries@thegivingtreefoundation.co.uk stating your interest in applying. The Giving Tree Foundation will then forward you the Correspondence Address, where you will have to forward your complete application.