Belhaven Hill School

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

Academic year 2027/2028

Please read the* Notes for Guidance *on pages 10 and 11 before completing this questionnaire

Please complete and return this form with all supporting documentation to: The Bursar, Belhaven Hill School, Belhaven Road, Dunbar, EH42 1NN no later than Friday 15th January 2027

1. PUPIL(S) INFORMATION

(a) Full name(s) .....

(b) Date of Birth .....

(c) Term/Year of entry (if not yet enrolled) .....

(d) Day pupil / Boarding pupil .....

2. PARENTS/GUARDIAN *(see note 2)*

		Father/step-father	Mother/step-mother
(a)	Names	.....	.....
(b)	Style or Title	.....	.....
(c)	Address(es)	.....	.....
		.....	.....
		.....	.....
(d)	Occupation	.....	.....

(e) Retired – Employed – Self Employed – Unemployed ***(circle which applies)***

(f) If not employed, please detail in Section 9: Other Information what steps are being taken to obtain employment.

(g)	Name & Address of Employer or business	.....	.....
		.....	.....
		.....	.....
(h)	Are you a Director 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	.....	.....
(i)	Daytime tel. no.	.....	.....
	Evening tel. no.	.....	.....
	Mobile tel. no.	.....	.....
	Fax. No.	.....	.....
	Email address	.....	.....

3. INCOME

3.1	FATHER'S INCOME	Actual 2025/26	Actual 2026/27	Estimated 2027/28
(a)	Gross annual salary and other similar earnings (including all taxable benefits and emoluments)	£.....	£.....	£.....
(b)	If self-employed, profits of business, farm estate or profession	£.....	£.....	£.....
(c)	Gross pension, etc	£.....	£.....	£.....
(d)	Gross investment income from:			
	i) Building Societies/Banks	£.....	£.....	£.....
	ii) Dividends	£.....	£.....	£.....
(e)	Gross income from property	£.....	£.....	£.....
(f)	Social Security benefits (including Child Allowance)	£.....	£.....	£.....
(g)	Separation or Maintenance Allowance	£.....	£.....	£.....
(h)	Is there a Court Order/Separation Agreement?	Yes/No	Yes/No	Yes/No
	If "yes", please state annual amount payable for school fees.	£.....	£.....	£.....
(i)	Benefits in Kind provided free by reason of employment	£.....	£.....	£.....
(j)	Any other income not included in (a) to (i) above	£.....	£.....	£.....

3.2 VERIFICATION OF FATHER'S INCOME

Please enclose documentary evidence in support of the income figures in Section 3. Please tick those you are enclosing:

P60
Copy of HMRC tax calculation issued under Self Assessment
Latest Pay Advice
Confirmation of Schedule D self employment income from an independent accountant
Annual report and accounts (including Balance Sheet)
Others (*please specify)*

3.3	MOTHER'S INCOME	Actual 2025/26	Actual 2026/27	Estimated 2027/28
(a)	Gross annual salary and other similar earnings (including all taxable benefits and emoluments)	£.....	£.....	£.....
(b)	If self-employed, profits of business, farm estate or profession	£.....	£.....	£.....
(c)	Gross pension, etc	£.....	£.....	£.....
(d)	Gross investment income from:			
	i) Building Societies/Banks	£.....	£.....	£.....
	ii) Dividends	£.....	£.....	£.....
(e)	Gross income from property	£.....	£.....	£.....
(f)	Social Security benefits (including Child Allowance)	£.....	£.....	£.....
(g)	Separation or Maintenance Allowance	£.....	£.....	£.....
(h)	Is there a Court Order/Separation Agreement?	Yes/No	Yes/No	Yes/No
	If "yes", please state annual amount payable for school fees.	£.....	£.....	£.....
(i)	Benefits in Kind provided free by reason of employment	£.....	£.....	£.....
(j)	Any other income not included in (a) to (i) above	£.....	£.....	£.....

3.4 VERIFICATION OF MOTHER'S INCOME

Please enclose documentary evidence in support of the income figures in Section 3. Please tick those you are enclosing:

P60
Copy of HMRC tax calculation issued under Self Assessment
Latest Pay Advice
Confirmation of Schedule D self employment income from an independent accountant
Annual report and accounts (including Balance Sheet)
Others (*please specify)*

		Father/ step-father		Mother/ step-mother	
		26/27	25/26	26/27	25/26
4.	**OUTGOINGS**				
(a)	Tax payable on incomes declared above *(including tax deducted at source)*	£.....	£.....	£.....	£.....
(b)	National Insurance Contributions	£.....	£.....	£.....	£.....
(c)	Pension Contributions	£.....	£.....	£.....	£.....
(d)	Mortgage interest (*include capital repayment as well as income)*	£.....	£.....	£.....	£.....
(e)	Endowment mortgage insurance	£.....	£.....	£.....	£.....
(f)	Any other interest payable *(please specify)*	£.....	£.....	£.....	£.....
	.....				
(g)	Annual landlord rent payable on principal residence	£.....	£.....	£.....	£.....
5.	**CAPITAL ASSETS** *(see note 5)*				
(a)	Approximate market value of all investments				
	i) Building Society/Bank Deposits	£.....	£.....	£.....	£.....
	ii) Equity Investments, government stocks	£.....	£.....	£.....	£.....
	iii) PEPs, ISAs, TESSAs	£.....	£.....	£.....	£.....
(b)	Approximate market value of principal residence (*Freehold or leasehold)*	£.....	£.....	£.....	£.....
(c)	Approximate market value of other possessions including house contents, car, etc	£.....	£.....	£.....	£.....
(d)	Cash at banks or elsewhere *(current accounts only)*	£.....	£.....	£.....	£.....
(e)	Approximate market value of any other assets *(please specify value of any Insurance policies maturing in this tax year or the last five years)*	£.....	£.....	£.....	£.....
(f)	Net worth/value of any business which you own or share	£.....	£.....	£.....	£.....
(g)	Approximate market value of any other properties owned either at home or abroad not included in (f) above. (i.e. holiday homes etc)	£.....	£.....	£.....	£.....
(h)	Redundancy, employment separation or lump sum payments	£.....	£.....	£.....	£.....

			Father/ step-father		Mother/ step-mother	
			26/27	25/26	26/27	25/26

6. CAPITAL LIABILITIES *(see note 6)*
(please give details of any capital charges against the assets declared in section 5)

(a)	Mortgage					
	-amount outstanding on house		£.....	£.....	£.....	£.....
	-final payment date		£.....	£.....	£.....	£.....
(b)	Other liabilities *(please specify)*		£.....	£.....	£.....	£.....
	SUB TOTAL	**Assets (5)**	£.....	£.....	£.....	£.....
		Liabilities (6)	£.....	£.....	£.....	£.....
		Net assets (5 – 6)	£.....	£.....	£.....	£.....

You should indicate if there are any reasons why net assets cannot be converted or utilised to pay school fees or to fund fees.

7. DEPENDANT CHILDREN ***(****see note 7)*
(Include the child to whom this application refers: If more than 4 children, please give details on a separate sheet.)

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

(iv) Annual Sum arising from Education Allowances	£.....	£.....	£.....	£.....
(v) Assistance from family members (e.g. Grandparents, Uncles, etc.)				
(vi) Assistance from any other sources (e.g. trusts, charities, etc – *please specify)*	£.....	£.....	£.....	£.....

(h) i) Annual income of child

Bank/building society interest	£.....	£.....	£.....	£.....
Income from Trusts	£.....	£.....	£.....	£.....
Other *(please state)*	£.....	£.....	£.....	£.....

ii) Other assets held in child's name

Bank/building society interest	£.....	£.....	£.....	£.....
Income from Trusts	£.....	£.....	£.....	£.....
Other *(please state)*	£.....	£.....	£.....	£.....

(i) Trusts

Please list all trusts held by parents, step-parents, grandparents, children and other close relatives and provide valuation of the Trust.

Name of Trust	**Beneficiary**	**Value**
.....	.....	.....
.....	.....	.....
.....	.....	.....

Please state if financial assistance would be available from family members if bursary not awarded.

8. OTHER DEPENDANTS *(see note 8) (please give details)*

.....

.....

.....

.....

9. ANY OTHER RELEVANT INFORMATION *(see note 9) (please continue on final page if necessary)*

.....

.....

.....

.....

.....

.....

9.1 IT WOULD HELP THE SCHOOL'S ASSESSORS TO KNOW THE FOLLOWING; *(please give details)*

(a) What contribution towards your child's fees at Belhaven do *you* feel that you could make in the current circumstances?

……

……

(b) What level of bursarial award are you seeking? (*please state the level as a percentage of fees*)

……

……

10. MONTHLY HOUSEHOLD INCOME AND EXPENDITURE ACCOUNT

MONTHLY INCOME – Total take home pay/business drawings/benefits £.....

MONTHLY EXPENDITURE DETAILS (To nearest £)

..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....
..... £.....

TOTAL EXPENDITURE £.....

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.

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

11. DECLARATION

After having read the attached notes, the following declaration should be signed by **both** parents/applicants (or see below):

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 my/our child and accept a place for him/her at the School the following terms and conditions will apply as between ourselves/myself and the School:-

(a) our/my child's fees account with the School will be credited termly with the amount of the Bursary for so long as the award remains in effect;

(b) **any award of a Bursary is subject to either termly or annual review and we/I must complete an annual declaration of our/my financial circumstances on the Application Form available from the School and supply all relevant supporting evidence by the return date indicated;**

(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 Schools Terms and Conditions attached to the Acceptance Form for our/my child;
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 School to evidence our/my financial circumstances;
iv) in the opinion of the Head, 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 School;
vi) there is a material change in our/my financial circumstances;
vii) the School's resources are insufficient to maintain the level of award.

(e) the bursary will be withdrawn and the value of any amount of the Bursary previously credited against our/my child's fee account will become repayable to the School forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the bursary.

BY SIGNING THIS FORM WE/I CONSENT TO BELHAVEN HILL SCHOOL RESERVING THE RIGHT TO PERFORM A DIRECTORS SEARCH/PROPERTY SEARCH AND CREDIT REPORT UNDER OUR/MY NAME AND ADDRESS

Signatures: (*see guidance note 2)*

Parent/Guardian ..... Date .....

Parent/Guardian ..... Date .....

GUIDANCE NOTES FOR COMPLETION OF BURSARY APPLICATION FORM

Before completing the form please read these notes carefully and contact the Bursar if further information or advice is required. These notes refer to the corresponding paragraph on the form.

The School 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 Pounds Sterling. References to Her Majesty's Customs & Excise (HMRC) include the relevant national Taxation Authority.

2. 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 part 1 of the Children (Scotland) Act 1995 (or any earlier enactment) and the partner (if any) of that guardian where the partner normally resides with the 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 under the Children (Scotland) Act 1995; 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 pupil either has no parents as defined above or the school 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 the Children (Scotland) Act 1995 the pupil shall be treated as one whose parents have no income for the purpose of the scheme; or
- where none of the above applies, the parent is the person with whom the pupil 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 pupil in the same household.
- If parents are separated or divorced before or while their child attends the School, both mother and father will require to complete and sign the Application Form.

3. 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, Pension, 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 t of capital allowances, losses and stock relief). Copies of the latest set of accounts should be included.

(d) All other Investment income (e.g. interest or National Savings Bank deposits; dividends, annuities et) 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.

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

(g) Court Orders, Legal Separation Agreements and Voluntary Arrangements for School Fees – Where a parent is required by a Court Order, or a legal binding separation agreement (e.g. Deed of Separation) to pay part of the School fees, then only that part of the fee which is not covered by the Court Order/agreement will be used to calculate any grant to be awarded. This is irrespective of whether or not the order or agreement is being completed with. Where the whole amount of the fees is required to be paid by virtue of a Court Order or separation agreement, applicants are not eligible for a grant. You should indicate how many years are payable and any annual variations. All receipts relating to maintenance payments, separation allowances and sums in respect of Child Support maintenance must be declared.

(i) Include free benefits in kind agreed by HMRC as not subject to tax, e.g. representative occupation of house, free meals.

(j) 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.

4. OUTGOINGS

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

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

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

(e) Only complete this if repayment is effected by means of a full Endowment Policy.

(f) Include bank overdraft and other loan charges incurred during the year (specifying the purpose of the loan).

5. PARENTS'/APPLICANTS' CAPITAL ASSETS

In addition to taking account of all relevant sources of income, the School 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.

(f) 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.

(g) 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.

6. PARENTS'/APPLICANTS' CAPITAL LIABILITIES

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

7. DEPENDANT CHILDREN

Use column number 1 for the child for whom you are now applying and his/her current school rate. 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.

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

(g) (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) Insurance Policies for School Fees – if any insurance policy for the payment of School fees exists then the amount declared is the amount receivable under the policy for the academic year for which the application is being made. If the insurance policy covers the full cost of the tuition fees then the pupil is not eligible for a grant. The types of policy concerned are those which stipulate that the company shall pay the school fees, in whole or in part, to the school in respect of the pupil.

(iii) Where a Trust has been established n favour of the child for whom you are applying, details of the annual amount available and the date of commencement of payment from the Trust should be given.

(h) Where the child has any unearned income, e.g. 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. Do not include any income from part time employment or student grants. You should enter the capital value of any beneficiary or other trust set up for each child.

8. OTHER DEPENDANTS

If you qualify for a Carer's Allowance or have an aged grandparent or relative living with you or dependant 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 grant, e.g. a significant change in income or outgoings for the coming year.

9.1 IT WOULD HELP THE SCHOOL'S ASSESSORS TO KNOW THE FOLLOWING

The School has only limited funds available for bursaries each year. The process of assessing applications and making awards is complicated. It is helpful for the assessors to know the minimum level of fee support a family would be seeking ie. what award you feel would either enable you to send your child to Belhaven, or would enable your child to remain as a pupil. As no two family budgets are the same, it would also be useful for assessors to understand how much you feel you can afford to pay towards your child's fees.

PAGE LEFT BLANK FOR ANY ADDITIONAL INFORMATION YOU WISH TO BRING TO THE SCHOOL'S ATTENTION THAT MIGHT BE PERTINENT TO YOUR APPLICATION