



ROEDEAN SCHOOL (SA)

INSPIRING A LIFE OF SIGNIFICANCE

APPLICATION FOR BURSARY ASSISTANCE

FULL NAME OF PUPIL: _____

YEAR FOR WHICH BURSARY ASSISTANCE IS REQUIRED: _____

GRADE: _____

DATE OF APPLICATION: _____

ROEDEAN SCHOOL (SA)

BURSARIES

Name of Award	Roedeane Bursaries /Roedeane Trust Merit Bursaries
Value	As determined by the Bursary & Scholarship Committee
Donor conditions	In some cases certain original donor conditions may have to be applied by the sub-committee.

Award Criteria

- Bursaries in the Junior School are restricted
- Applicants must have the academic ability to benefit from a Roedeane education
- A written request must be addressed to the Executive Head from the parent or guardian, stating clearly the particular circumstances that have led to the request for financial assistance
- A request for bursary assistance must be motivated and supported by the appropriate documentation as requested as per the attached application.
- All submissions will be treated confidentially by the Committee
- Bursary awards will be given for one academic year or portion thereof, and must be applied for and re-evaluated annually as above
- The applicant and at least one parent should be South African citizens or have permanent residence. Roedeane School reserves the right to request proof of citizenship

Performance : Conditions of Continued Support (Annual Review)

- The pupil's behaviour must conform to the Guiding Principles and she must make a positive contribution to the Roedeane community
- The pupil must continue to participate actively in school life, conform to school rules and benefit from the Roedeane experience
- The parent must consider becoming an active member of the PTA or the S.A.O.R.A. (depending on the source of the funding), and must contribute time and talents to the furtherance of the work for these organizations within the school. Such involvement is encouraged but the parent's individual circumstances will be taken into account
- A letter of thanks must be addressed annually to the Executive Head for the Bursary and Scholarship Committee
- As a term's notice of withdrawal is needed by the school, a further written request for funding must be submitted to the Executive Headmistress for consideration by the Bursary and Scholarship Committee by 30 June for the following year
- Updated financial disclosure will be required by Roedeane from parents every year, alternatively on request by the Bursary & Scholarship Committee

Conditions for Withdrawal of Award

- Improvement in the financial circumstances of the parent or guardian
- Failure of the parent to conform to the requirements stipulated above
- Failure of the pupil to benefit from the Roedeane experience or to conform to the Guiding Principles
- Insufficient bursary funding being available
- Bursaries may be withdrawn due to non-payment of school fees

ROEDEAN SCHOOL (SA) BURSARY APPLICATION

PLEASE PAY PARTICULAR ATTENTION TO THE FOLLOWING:-

NO APPLICATION WILL BE CONSIDERED WITHOUT ALL OF THIS INFORMATION

Incomplete forms will be returned to the applicant which can result in delays causing the application form to reach this office too late for the Bursary Committee meeting, so please do ensure that all questions on the form are completed.

Please note a written request for funding must be submitted to the Executive Head for consideration by the Bursary and Scholarship Committee

BURSARY CHECK LIST for you	(Please tick)	
<p>Letter of motivation</p> <ul style="list-style-type: none"> As per points 8-12 must be attached for the application to be considered in the first place. If you have children at other Independent Schools and do not, or have not requested bursary assistance from those schools, the Bursary Committee will require your reasons for not doing so. 	YES	NO
<p>Salary advice</p> <ul style="list-style-type: none"> Your latest salary advice from your employer 	YES	NO
<p>Annual Income & Expenditure, and Statements of Assets & Liabilities</p> <ul style="list-style-type: none"> Please show ANNUAL Income and Expenditure to the nearest R1000. Kindly ensure that all sections are completed as the Committee cannot undertake to extract figures from other financial statements which you may attach as support documents. Show all figures in South African Rand. If you have converted figures from a foreign currency, please indicate the rate of exchange used. 	YES	NO
<p>Income tax Assessment (IT34)</p> <ul style="list-style-type: none"> Your latest Income Tax Assessment is required. If you do not have a Tax Assessment for the year under review, the form you received for the previous year will suffice. 	YES	NO
<p>Net Profits of Business</p> <ul style="list-style-type: none"> (Please attach Financial Statements. Add depreciation included therein) 	YES	NO
<p>Completed Statement submit by no later than 30 June</p> <ul style="list-style-type: none"> Please be sure to keep a copy of your completed statement 	YES	NO

PERSONAL INFORMATION:

Applicant's name in full: _____

Marital Status: _____

Residential Status: _____

Full names of spouse: _____

Identity Number: Self: _____ Spouse: _____

Income Tax Number: Self: _____ Spouse: _____

Residential Address: _____

Postal Address: _____

Occupation: Self: _____ Spouse: _____

Name of employer / business: Self: _____ Spouse: _____

Address of employer / business: Self: _____

Address of employer / business: Spouse: _____

Telephone home Self _____ Spouse _____

Telephone Business Self: _____ Spouse: _____

Fax numbers: Self: _____ Spouse: _____

Cell Phones: Self: _____ Spouse: _____

E-Mail: Self: _____ Spouse: _____

1 Name of child/ren for whom assistance is required: _____

2 Grade for which bursary is being sought: _____

3 Dependent children:

Names	Ages	Current School/Uni	Annual Fees	Assistance Applied For Yes / No	Amount Received
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

4 **NAME & ADDRESS OF PERSONAL BANKERS:** _____

Bank: Self: _____ Spouse: _____

Account Name: Self: _____ Spouse: _____

Account Number: Self: _____ Spouse: _____

Branch Code: Self: _____ Spouse: _____

5 IF SELF EMPLOYED or Majority partner / member / shareholder of a business / partnership / company / CC: Name and kind of business and name and address of business bankers:

	Self	Spouse	Child
Name of Business(es)			
Name & Address of Business Bankers			

6 Are you, your spouse or children the capital or income beneficiaries of a Trust? **Yes** **No**

(Please supply details on a separate schedule.)

7 If your child is already at Roedean School (SA) what has made it necessary for you to ask for or reapply for assistance at this stage?

8. Do you receive any assistance towards the education of any of your children from any other source? (e.g. Family Trust, grandparents etc). If so, please give details:

9. **SPECIAL CIRCUMSTANCES:** (Indicate any special circumstances you wish the Bursary Committee to take into account).

10. Do you and / or your wife or child receive a free, or subsidised, house, car , or any other benefits? Please detail below.

SELF

SPOUSE

11. DETAILS OF FIXED PROPERTY(IES):

Purchase Price:	Self: _____	Spouse: _____
Market Value:	Self: _____	Spouse: _____
Details / Description:	Self: _____	Spouse: _____
Bond holder:	Self: _____	Spouse: _____
Outstanding amount:	Self: _____	Spouse: _____
Monthly repayments:	Self: _____	Spouse: _____

12. DETAILS OF MOTOR VEHICLES(S):

Year, make & Model:	Self: _____	Spouse: _____
Purchase Price:	Self: _____	Spouse: _____
Current Market Value:	Self: _____	Spouse: _____
Lease / hire purchase details:	Self: _____	Spouse: _____
Institution:	Self: _____	Spouse: _____
Outstanding amount:	Self: _____	Spouse: _____

STATEMENT OF FAMILY ANNUAL INCOME AND EXPENDITURE

INCOME	R	EXPENDITURE	R
Gross Salary (Self)		Pension (Self)	
Gross Salary (Spouse)		(Spouse)	
Alimony received		Tax (Self)	
Net Profits of Business (Please attach Financial Statements. Add depreciation included therein)		(Spouse)	
Dividends		Personal Expenditure (e.g. Clothing)	
Income from Trusts (Self)		Rent / Mortgage Bond	
(Spouse)		Property rates	
(Children)		Interest on Borrowings	
Income from Investments -Dividends		Electricity and water	
Interest		Telephone / Cell	
Other		TV / M-Net etc	
Income earned from abroad		Subscriptions (Clubs / Magazines)	
Cash, gifts of any money paid on your behalf		Domestic Wages	
Pension / Annuities		Life / Endowment Insurance / RA's	
Net Rental Income		House Insurance	
Other income from Financial Support, Company, Grandparents, etc		Vehicle Insurance	
Directors' / Members' Fees		Vehicle Loan	
Drawings ex Business/Co/CC/partnerships		Vehicle Running Expenses	
Value of Fringe Benefits (c/f ex back page)		Household Maintenance	
		Medical & Dental	
		Gifts / Donations	
		Living Expenses	
		Internet / Computer	
		Entertainment	
		Holidays	
		Unit Trusts	
		HP / Lease Payments	
		Alimony paid	
		Parental support etc	
		Other payments (please specify)	
		SUB TOTAL:	
		Education Costs (specify)	
TOTAL .			

**JOINT STATEMENT OF ASSETS AND LIABILITIES
(To nearest R1000)**

LIABILITIES R		ASSETS R	
Due to Banks	Self..... Spouse.....	Bank Balance	Self..... Spouse.....
Open Accounts	Self..... Spouse.....	Cash	Self..... Spouse.....
Owing under Hire-Purchase Agreements / Leases (Detail Assets Secured)	Self..... Spouse.....	Quoted Shares and other Liquid Assets	Self..... Spouse.....
Other Short term Liabilities (Detail)	Self..... Spouse.....	Shares & Loan Accounts in Private Companies, CC's , Partnerships, Business', Trusts etc (Indicate % held and attach Financial Statements)	Self..... Spouse.....
Bonds (Detail separately)	Self..... Spouse.....	Fixed property (c/f Ex Back page)	Self..... Spouse.....
General or Special Notarial Bonds (Detail)	Self..... Spouse.....	Vehicles c/f Ex Back page)	Self..... Spouse.....
Foreign Liabilities	Self..... Spouse.....	Foreign Assets	Self..... Spouse.....
Other Long Term Liabilities (Detail)	Self..... Spouse.....	Assets / Furniture / Fittings etc	Self..... Spouse.....
		Life Insurance (Extend Surrender Value)	Self..... Spouse.....
		Personal Effects	Self..... Spouse.....
		Children's Assets (Please specify)	
SUB TOTAL: Surplus / (Deficit)			
TOTAL:		TOTAL:	

I HEREBY DECLARE THAT:

- 1 To the best of my/our knowledge and belief this is a true and correct statement.
- 2 My/our assets are not encumbered nor ceded other than as stated herein.
- 3 I/we will advise the Bursar should my/our financial position improve.
- 4 I/we will treat any bursary assistance and the terms thereof I/we might receive as being strictly confidential.
- 5 I/we attach IT34.
- 6 I/we attach my/ our latest salary slips and **last three months bank statements.**
- 7 I/we attach Business / CC / Co / Partnership / Trust Financial statements.
- 8 I/We understand that irrespective of the nature and extent of any bursary awarded, this award is subject to circumstance, including the pupil's attendance, performance, progress or behaviour and my/our personal circumstances, and may be withdrawn by the School should the continuation of the bursary no longer be merited.

DATE:

SIGNATURE:..... (Applicant)

SIGNATURE:..... (Witness)

SIGNATURE:..... (Spouse)

SIGNATURE:..... (Witness)