

ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

APPLICATION FOR ASSISTANCE FOR COLLEGE OR UNIVERSITY EXPENSES. (1st YEAR)

CRITERIA FOR APPLICANTS

- A. The applicant was born in the Parish of Lumphanan or his/her parents were resident within Lumphanan at the date of the applicant's birth.
- B. The applicant has lived within Lumphanan for five years before the application and continues to live there.
- C. The applicant was born in either Torphins or Kincardine O'Neil or the applicant's parents were resident within Torphins or Kincardine O'Neil at the applicant's birth or the applicant has lived within either of the parishes for five years before the application and continues to live there.

Alexander W Davie Charitable Trust

Applicant Details

Details of Child or young person

Name: _____ Date of Birth ____ / ____ / ____
(birth certificate required)

Home Address: _____

Number of years at Home address _____
(current year's council tax form required)

Details of parent or guardian applying on child's behalf

Name _____

Address _____

Day time Telephone/Contact No. _____

Parents address at the time of your birth: _____

Have you, or any of your siblings, previously applied to the Trust yes / no

If yes, was your / their application successful? yes / no

Name and Date of previous application _____

Names and ages of dependant brothers and sisters _____

Are they still in full time education yes / no

If yes, at what school and what fees, if any are being paid _____

Course Details

**Which College/University
Do you propose to attend** _____

Acceptance letter enclosed

Yes / no

If no, provide a reason _____

Stay at home or live away _____

If away – term address _____

Details of Course:-

Duration of course _____

Year i.e. 1st, 2nd, Final _____

Final Qualification _____

Costs of Course

Course Fees

£ _____

Are these being paid for Yes / No, if yes, by whom _____

Accommodation

Halls of Residence or private

Halls / Private

Is food / utilities included in accommodation costs

Yes / no

How many weeks is this to be paid for

Accommodation Cost per week

£ _____

Food per week

£ _____

Utilities per week

£ _____

(Universities give guidelines of additional costs)

Daily Travel

£ _____

Travel home

£ _____

Books/Equipment

£ _____

Other expenses

£ _____

Estimated total cost for academic year

£ _____

Course Funding

Have you applied for an award from any other source

SAAS BURSARY Yes / no

SAAS LOAN Yes / no

Educational maintenance allowance (EMA) (£30 per term time week) Yes / no

If you have not applied, state why you have not done so _____

If yes, how much have you been granted (proof of award will be required)

Awarded / Still awaiting to hear SAAS BURSARY Amount £ _____

Awarded / Still awaiting to hear SAAS LOAN Amount £ _____

Awarded / Still awaiting to hear (EMA) Amount £ _____

If you have been refused a grant please provide copy of the refusal letter.

Do you / will you have a student Loan Yes/no

If yes, how much £ _____

FINANCIAL POSITIONS OF ANY OTHER RELEVANT PARTIES

PARENTS / GUARDIAN

Gross Annual Income (see notes)

Applicants are required to submit the previous years' p60 form and HMRC letter re any benefits along with the application form.

	Parent 1	Parent 2 / Partner	total
Salary			
Maintenance payments			
Child Benefit			
Working tax credit			
Investment income			
Other			
Total	£	£	£

Allowable Monthly Expenditure

	Monthly amount
Mortgage / rent	
Pension / Life insurance premiums	
Loans	
Council Tax	
Utilities	
Food	
Other	
Total	£

Capital Assets (see notes)

	Value
House	
Investments	
Bank Accounts	
Building Society Accounts	
Other	
Total	£

FINANCIAL POSITIONS OF ANY OTHER RELEVANT PARTIES, CONT'D

STUDENT INCOME

Gross Annual Income (see notes)

Students are required to submit the previous years' p60 form and HMRC letter re any EMA being paid to them along with the application form.

	Amount
Wages	
EMA	
Other grant income	
Other	
Total	£

ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

I, (applicant) _____

certify that :-

- a) that the information contained in pages 2, 3,4 & 6 of this Application is correct.
- b) I shall inform the Trustees of any change in financial circumstances, or any permanent change of address occurring during the period of the grant.
- c) I undertake that if awarded a grant, I will keep in regular and punctual attendance for the full length of the course, and I shall refund the amount of the grant received, in the event of my leaving before the end of the course other than for a reason satisfactory to the Trustees.

Signature of Applicant _____

Postal Address _____

Date _____

ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

I, (parent/guardian) _____

certify that :-

- d) that the information contained in all pages of this Application is correct.
- e) I shall inform the Trustees of any change in financial circumstances, or any permanent change of address occurring during the period of the grant.
- f) I undertake that if my child/ward is awarded a grant, they will keep in regular and punctual attendance for the full length of the course, and I shall refund the amount of the grant received, in the event of my child/ward leaving before the end of the course other than for a reason satisfactory to the Trustees.

Signature of Applicant's
Parent or Guardian (if appropriate)

Postal Address

Date

ALEXANDER WILLIAMS DAVIES CHARITABLE TRUST

Before submitting the application form to Mazars CYB Services please ensure that you have:-

- Fully completed and signed the form (applicant and parent)
- Enclosed appropriate proof of household income (P60 or accounts)
- Enclosed applicant birth certificate
- Enclosed any documentation relative to grants from other sources
- Enclosed the current year's council tax form.

Should your application be successful the Trustees will in addition require sight of the following before payment can be made:-

- Passport
- Letter of acceptance from College or University for coming academic year

ALEXANDER WILLIAMS DAVE'S CHARITABLE TRUST

The Trustees would be grateful if you could take a minute to answer the following question.

Please confirm where you heard about the Trust

- A. Through the local school
 - B. Through word of mouth
 - C. Through advertising
 - D. Through the posters in each village
 - E. Other please specify
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