

ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

APPLICATION FOR ASSISTANCE FOR SCHOOL CHILDREN

(This application form can be used where parents require assistance with such items as school trips, tutoring etc).

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 on first application only)

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. _____

Your address at the time of your child's birth: _____

Have you, previously applied to the Trust for any child yes / no

If yes, was your application successful? yes / no

Date of previous application _____

Names and ages of all dependant children _____

Are they still in full time education yes / no

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

Expense Details

Reason for application (complete whichever appropriate)

School Trip

When, and to where _____

Note – payment for a trip will be paid directly to the school if awarded

School Uniform

What is required _____

Tutoring

Subject / How long required _____

Other _____

Sum requested from Trust £ _____

Date assistance required by _____

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	£

ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

I, (parent) _____

certify that :-

- a) that the information contained in all pages 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, the funds will be used solely for the purposes detailed in the application, and I shall refund the amount of the grant received, in the event of the funds no longer being required. (e.g. cancellation of trip, or tutoring no longer required)

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
- Enclosed appropriate proof of household income (P60 or accounts)
- Enclosed applicant birth certificate (only required on first application)
- 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 (parent)
- Paperwork from school relating to school trip

ALEXANDER WILLIAMS DAVIES 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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