

# ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

## APPLICATION FOR ASSISTANCE FOR CONTINUING COLLEGE OR UNIVERSITY EXPENSES.

### 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.

**Scottish Charity Reference Number SC024169**

# Alexander W Davie Charitable Trust Applicant Details

## Details of Child or young person

Name: \_\_\_\_\_ Date of Birth \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Home Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of years at Home address \_\_\_\_\_

## 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. 2<sup>nd</sup>, 3<sup>rd</sup>, Final \_\_\_\_\_

**Final Qualification** \_\_\_\_\_

## **Costs of Course**

**Course Fees**

£ \_\_\_\_\_

**Are these being paid for** Yes / No, if yes, by whom \_\_\_\_\_

## **Term Accommodation**

**How many weeks is this to be paid for** \_\_\_\_\_

**Accommodation Cost per week**

£ \_\_\_\_\_

**Food per week**

£ \_\_\_\_\_

**Utilities per week**

£ \_\_\_\_\_

**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 £ \_\_\_\_\_

# PROGRESS REPORT

Give brief report on previous year \_\_\_\_\_

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Results of exams sat last year \_\_\_\_\_

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Applicant Signature \_\_\_\_\_

Parent Signature \_\_\_\_\_

# 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.

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

### Allowable Monthly Expenditure

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

### Capital Assets (see notes)

	<b>Value</b>
House	
Investments	
Bank Accounts	
Building Society Accounts	
Other	
<b>Total</b>	£

# 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.

	<b>Amount</b>
Wages	
EMA	
Other grant income	
Other	
<b>Total</b>	£

# ALEXANDER WILLIAMS DAVIE'S CHARITABLE TRUST

I, (applicant) \_\_\_\_\_

certify that :-

- a) that the information contained in pages 2, 3, 4, 5 & 7 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, 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 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:-

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