**STRICTLY CONFIDENTIAL**

TRINITY COLLEGE
UNIVERSITY of OXFORD

# STATEMENT OF FINANCIAL CIRCUMSTANCES IN SUPPORT OF AN APPLICATION FOR A 2026/27 LEVINE BURSARY

Before completing this document, please read the Explanatory Notes carefully and contact the College Accountant if further information or advice is required.

## 1. The student

| | | |
|---|---|---|
| A | Full name | |
| B | Home address | |
| C | Post code | |
| D | Nationality | |
| E | Date and place of birth | |
| F | Course of study | |

## 1. The Student (continued)

| G | **Other sources of financial assistance** ***Please insert annual values*** | **Confirmed amount (if a response has been received)** | **Amount applied for (if awaiting confirmation of award)** |
|---|---|---|---|
| | Government Maintenance Loan | | |
| | Government Maintenance Grant | | |
| | Oxford Bursary or Crankstart Scholarship | | |
| | Family assistance | | |
| | Scholarship | | |
| | Other sources of funds (please state body, amount awarded/requested and expected date of response): | | |

If you are a UK student who has not applied for government support, please explain why:

| |
|---|
| |

## 2. The Parent(s)/Guardian(s)

| | | **Parent/Guardian 1** | **Parent/Guardian 2** |
|---|---|---|---|
| | | | |
| A | Full name | | |
| B | Title (e.g. Mr/Ms/Mrs/Miss) | | |
| C | Relationship to student | | |
| D | Address | | |
| E | Post code | | |
| F | Day time telephone number | | |
| G | Mobile number | | |
| H | E-mail address | | |

## 3. The occupation of the Parent(s)/Guardian(s)

| | | **Parent/Guardian 1** | **Parent/Guardian 2** |
|---|---|---|---|
| | | | |
| A | Employed | Yes/No | Yes/No |
| B | If employed, please give job title and state full or part time | | |
| C | Self-employed | Yes/No | Yes/No |
| D | Description of business | | |
| E | Are you a director or shareholder of this company or business? | Yes/No | Yes/No |
| F | If “Yes”, please state proportion of company beneficially owned | | |
| G | Unemployed | | |
| H | Retired | | |
| I | Other (please describe) | | |

## 4. The income of the Parent(s)/Guardian(s)

| | *Please insert __annual__ values* | **Parent/Guardian 1** | **Parent/Guardian 2** |
|---|---|---|---|
| | **(Must align with household income submitted to Student Finance or explain in other information section)** | | |
| A | Gross salary and other emoluments (including all taxable benefits and expenses) | | |
| B | Taxable profits of trade or profession for last two accounting periods | | |
| C | Gross pension(s) | | |
| D | Gross investment income (including dividends and interest) | | |
| E | Gross rental income | | |
| F | Social Security benefits | | |
| G | Separation or maintenance allowance | | |
| H | Is there a Court/Order/Separation Agreement? | **Yes/No** | **Yes/No** |
| I | Any other income (please describe) | | |

## 5. The outgoings of the Parent(s)/Guardian(s)

| | *Please insert values paid for a full year* | **Parent/Guardian 1** | **Parent/Guardian 2** |
|---|---|---|---|
| A | Pension annual contributions | | |
| B | Gross mortgage annual payments | | |
| C | Rent annual payments | | |
| D | Other annual interest payable (please state nature) | | |

## 6. The capital assets of the Parent(s)/Guardian(s)

| | | **Parent/Guardian 1** | **Parent/Guardian 2** |
|---|---|---|---|
| | | | |
| A | If owned, approximate current market value of home | | |
| B | Mortgage outstanding/balance due | | |
| C | Approximate market value of any investments (please specify) | | |
| D | Net worth/value of your interest in any businesses, other property or land | | |

## 7. Dependent children

| | | 1 | 2 | 3 | 4 |
|---|---|---|---|---|---|
| | | | | | |
| A | Date of birth | | | | |
| B | Please indicate if the child is at school or university | | | | |
| C | School type: state or private | | | | |
| D | If private, annual fees | | | | |
| E | Amount of fees covered by other than Parent(s)/Guardian(s) | | | | |

## 8. Other dependents

Please give details of any other dependents

| |
|---|
| |

## 9. Verification of income

It will be helpful in assessing this application if you can provide as much documentary evidence as possible in support of the income figures in Section 4. Please tick those you are enclosing.

**P60 and P11D**

**Latest pay advice**

**Accountant's certificate**

**Other (please specify)**

## 10. Other information

Please give any other information that you believe is relevant in the context of our assessment of this application.

| |
|---|
| |

## Declaration by the Student

After having read the Explanatory Notes, the following declaration should be signed by the Student.

I confirm that the information that I have provided is complete and accurate.

I understand and agree that, if I am offered a 2026/27 Levine Bursary, the following terms and conditions will apply as between Trinity College and me:-

a) My battels account will be credited termly with one third of the Bursary for so long as it remains in place.
b) The award of a Levine Bursary is subject to annual review. The Bursary will be renewed if (i) I have made satisfactory academic progress during the previous year as determined by my tutors, and (ii) the financial situation of my Parents/Guardians as disclosed on an annual declaration to be completed by them in accordance with the College's requirements remains materially unchanged.
c) The Bursary may be withdrawn or reduced at any time during my course if:
    i) I act in breach of the College's regulations as set out in the College Handbook;
    ii) my Parents/Guardians fail to return the annual declaration of their financial circumstances or to produce any additional information required by the College to evidence their financial circumstances by the return dates indicated;
    iii) I am more than 28 days in arrears in respect of any amount due and owing to the College; or
    iv) there is a material change in my Parents'/Guardians` financial circumstances;
d) the Bursary will be withdrawn and the value of any amount of the Bursary previously credited to my battels account will become repayable to the College forthwith if my Parents/Guardians have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary. (Such cases may be reported to the relevant authorities.)

I acknowledge that the decision of the College as to the numbers, recipients and value of 2026/27 Bursaries is final.

| | |
|---|---|
| ………………………………………. | …………………………………………… |
| Student | Date |

## Declaration by the Parent(s)/Guardian(s)

After having read the Explanatory Notes, the following declaration should be signed by the Parent(s)/Guardian(s).

We/I have made a complete declaration of our/my income, assets and liabilities.

We/I understand that if the Student is offered a 2026/27 Levine Bursary, the following terms and conditions will apply as between Trinity College and the Student:-

a) The Student's battels account will be credited termly with one third of the Bursary for so long as it remains in effect.
b) The award of a Bursary is subject to annual review. The Bursary will be renewed if (i) the Student has made satisfactory academic progress during the previous year as determined by his/her tutors, and (ii) our/my financial situation as disclosed on an annual declaration to be completed in accordance with the College's requirements remains materially unchanged.
c) We/I will report immediately any material change in the financial position declared;
d) The Bursary may be withdrawn or reduced if:
    v) the Student acts in breach of the College's regulations as set out in the College Handbook;
    vi) we/I have failed to return the annual declaration of our/my financial circumstances or to produce any additional information required by the College to evidence our/my financial circumstances by the return dates indicated;
    vii) the Student is more than 28 days in arrears in respect of any amount due and owing to the College; or
    viii) there is a material change in our/my financial circumstances;
e) The Bursary will be withdrawn and the value of any amount of the Bursary previously credited against the Student's battels account will become repayable to the College forthwith if we/I have fraudulently, knowingly or recklessly provided false information in relation to the award of the Bursary. (Such cases may be reported to the relevant authorities.)

We/I acknowledge that the decision of the College as to the numbers, recipients and value of 2026/27 Bursaries is final.

……………………………………….. ………………………………………………..
Parent Date

……………………………………….. ………………………………………………..
Parent Date