

EDUCATIONAL & BENEVOLENT TRUST

APPLICATION FOR EDUCATIONAL SUPPORT OR BENEVOLENT ASSISTANCE

Name

Address

Postcode

Telephone

Date of Birth

Email

Marital Status

Occupation

The Trust has two distinct objects, please select which object best suits your requirements:

Educational (Please ✓)

Benevolent (Please ✓)

The advancement of public education in accountancy and related commercial subjects.

The relief in cases of need, hardship or distress of persons who are Fellows, Members or registered Students of the AIA, and their spouses, children and other dependents.

Name of Member or former Member

(State N/A if you are not a Member, or former Member, or dependent of a Member and leave membership details blank below).

AIA Membership Number

Membership Period

From

To

Please provide details relating to the cost of assistance you require in £ and provide a brief description of what the assistance will be used for.

£

Description:

Estimated Expenditure
(for the next 12 months)

Applicant's Details

Spouse/Partner's Details

£
sterling

Local
Currency

£ sterling

Local
Currency

Regular household payments

Mortgage repayment

_____	_____	_____	_____
-------	-------	-------	-------

Rent

_____	_____	_____	_____
-------	-------	-------	-------

Insurance

_____	_____	_____	_____
-------	-------	-------	-------

Service charge

_____	_____	_____	_____
-------	-------	-------	-------

Rates or local taxes

_____	_____	_____	_____
-------	-------	-------	-------

Water rates

_____	_____	_____	_____
-------	-------	-------	-------

Heating and lighting

_____	_____	_____	_____
-------	-------	-------	-------

Television licence/satellite/cable fees

_____	_____	_____	_____
-------	-------	-------	-------

Rented household appliances

_____	_____	_____	_____
-------	-------	-------	-------

Telephones (landline and mobiles)

_____	_____	_____	_____
-------	-------	-------	-------

Household fuel

_____	_____	_____	_____
-------	-------	-------	-------

General payments

Medical

_____	_____	_____	_____
-------	-------	-------	-------

Clothing

_____	_____	_____	_____
-------	-------	-------	-------

Papers and magazines

_____	_____	_____	_____
-------	-------	-------	-------

Life assurance and pensions

_____	_____	_____	_____
-------	-------	-------	-------

Car (tax, insurance, fuel, maintenance)

_____	_____	_____	_____
-------	-------	-------	-------

Hire purchase (give details)

_____	_____	_____	_____
-------	-------	-------	-------

Loan repayments (give details)

_____	_____	_____	_____
-------	-------	-------	-------

Credit/store card payments

_____	_____	_____	_____
-------	-------	-------	-------

Travel expenses (give details)

_____	_____	_____	_____
-------	-------	-------	-------

Any other regular expenses (give details)

_____	_____	_____	_____
-------	-------	-------	-------

_____	_____	_____	_____
-------	-------	-------	-------

One-off payments

Holidays

_____	_____	_____	_____
-------	-------	-------	-------

Repairs

_____	_____	_____	_____
-------	-------	-------	-------

General large purchases (give details)

_____	_____	_____	_____
-------	-------	-------	-------

Any other one-off expenses (give details)

_____	_____	_____	_____
-------	-------	-------	-------

_____	_____	_____	_____
-------	-------	-------	-------

Total estimated expenditure

_____	_____	_____	_____
-------	-------	-------	-------

Estimated Income (for the next 12 months)	Applicant's Details		Spouse/Partner's Details	
	£ sterling	Local Currency	£ sterling	Local Currency
Regular Income				
Employed person's earnings	_____	_____	_____	_____
Self-employed person's earnings	_____	_____	_____	_____
State pension	_____	_____	_____	_____
Occupational pension	_____	_____	_____	_____
Income from property (after expenses)	_____	_____	_____	_____
Income from lodgers/borders	_____	_____	_____	_____
Regular payments from relatives	_____	_____	_____	_____
Dividends/interest from investments/savings	_____	_____	_____	_____
Unemployment benefit	_____	_____	_____	_____
Sickness benefit	_____	_____	_____	_____
Child benefit	_____	_____	_____	_____
Housing benefit	_____	_____	_____	_____
Attendance allowance	_____	_____	_____	_____
Mobility allowance	_____	_____	_____	_____
Other state benefit (give details)	_____	_____	_____	_____
Other charities' grants (give details)	_____	_____	_____	_____
Any other regular income (give details)	_____	_____	_____	_____
Any one-off grants, gifts etc. (give details)	_____	_____	_____	_____
Total Estimated Income	=====	=====	=====	=====
Assets and Liabilities				
Value of property	_____	_____	_____	_____
Value of stocks and shares owned	_____	_____	_____	_____
Balance in bank and savings accounts	_____	_____	_____	_____
Other assets (give details)	_____	_____	_____	_____
Amount of mortgage and term outstanding (give details)	_____	_____	_____	_____
Amount of outstanding loans	_____	_____	_____	_____
Amount of outstanding credit cards	_____	_____	_____	_____
Amount of outstanding hire purchase	_____	_____	_____	_____
Other liabilities (give details)	_____	_____	_____	_____
Total Assets less Liabilities	=====	=====	=====	=====

Have you applied for or received assistance from any other society or person? If so, please give particulars.

Have you taken advice from Counsellors or other Professional advisors to ensure you have claimed all state benefits you are entitled to? If so, please provide details.

Give the name, full address, email address and telephone number of a Member of the AIA or other Professional Accountant, barrister, solicitor, doctor, clergyman, or other persons, to whom reference can be made. Two names should be given and the persons referred to should be fully acquainted with your circumstances. These persons may be contacted, prior to a Trustees meeting, for a character reference.

Name	_____	Occupation	_____
Address	_____		
	Postcode	_____	
Relationship to applicant	_____		

Name	_____	Occupation	_____
Address	_____		
	Postcode	_____	
Relationship to applicant	_____		

Please list any documents you have provided with your application.

Blank lines for listing documents provided with the application.

DECLARATION

I declare that the foregoing statements made by me are correct to the best of my knowledge and I undertake to inform the Association of International Accountants Educational and Benevolent Trust immediately of any changes in my circumstances. I authorise the Association of International Accountants Educational and Benevolent Trust and anyone properly instructed on its behalf to make any enquiries deemed necessary by it in support of my application. I consent to the disclosure of any information provided by me to other charities and/or parties who may be contacted in the course of such enquiries. I understand that this process may include enquiries of, and disclosure of, information to any relevant medical expert or doctor, my general practitioner, any referee indicated on this form and any individual or body that can verify the information provided by me in this form. I consent to this.

I understand that this information will be retained and processed for the purpose of this and future applications made to the Association of International Accountants Educational and Benevolent Trust. I consent to this.

Signature of applicant _____ Date _____

Did the applicant complete the form (please ✓) Yes No

If the answer to the above is No, please provide the name, full address, e-mail address and telephone number below and state the relationship to the applicant.

Blank lines for providing details if the applicant did not complete the form.

Further information on the AIA Educational and Benevolent Trust is available at www.aiaworldwide.com/educational-and-benevolent-trust.

Registered with the Charity Commission 1118333.

Please return the form to AIA Educational and Benevolent Trust, Association of International Accountants, Staithes 3, The Watermark, Metro Riverside, Newcastle Upon Tyne, NE11 9SN