

Educational & Benevolent Trust

Application for Educational Support or Benevolent
Assistance

Application for Educational Support or Benevolent Assistance

Please complete	
Title:	
Surname/Family Name:	
First Names:	
Home Address:	
Town:	County:
Post /Zip Code:	
Country:	
Date of Birth:	
Email:	
Telephone:	Home/Work
Marital Status:	
Occupation:	

The Trust has two distinct objectives, please select which objective best suits your requirements:

- i) **Educational**
The advancement of public education in accountancy and related commercial subjects.
- ii) **Benevolent**
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: _____

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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 & Lighting				
Television License / Satellite / Cable Fees				
Rented Household Appliances				
Telephones (Landline and Mobiles)				
Household Fuel				

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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				

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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 Investment / Savings				
Unemployment Benefit				
Sickness Benefit				
Child Benefit				
Housing Benefit				
Attendance Benefit				
Mobility Allowance				
Other State Benefit (Give Details)				
Other Charities' Grants (Give Details)				
Any Other Regular Income (Give Details)				

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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				

Name	Age	Relationship	Contribution (£)	Career ✓ / x

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Please provide full details relating to your application including the circumstances necessitating this application and a breakdown of the support required and how the support would benefit you.

Please use additional sheets if required

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

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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:

Town:

County:

Post /Zip Code:

Country:

Relationship to Applicant:

Name:

Occupation:

Address:

Town:	County:
Post /Zip Code:	
Country:	
Relationship to Applicant:	

Please list any documents you have provided with your 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:

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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.

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



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