

Chartered Banker
2025
Foundation

**GUIDELINES FOR BURSARY
APPLICATION**
CHARTERED BANKER

2025

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INTRODUCTION

The 2025 Foundation is pleased to offer bursary awards to support talented individuals who wish to study banking qualifications offered by the Chartered Banker Institute or their partners.

Our bursary scheme aims to support individuals who wish to pursue a career in banking but would find this difficult because of their financial circumstances.

Bursaries are awarded to individuals who meet our set criteria:

- Young persons whose household income is £34,000 or less
- Adult applicants not currently in employment, whose income does not exceed £18,000 per annum.

Awards will be based on how well the applicant demonstrates the likelihood of success in completing a course of studies, why they should be considered for a bursary and the difference it will make.

If your application is successful you will be expected to provide one of the following as evidence in order to receive your bursary. If you are not able to produce the supporting documents, then your application will be rejected.

This can be one of:

- Copy of your (adult applicants), or your parents'/guardians', P60 for the previous financial year
- Evidence that you are in receipt of Educational Maintenance Allowance (EMA) or 16–19 Bursary Fund.

Mentoring Support

Acceptance of a bursary award is conditional on taking part in the 2025 Foundation Mentoring Scheme. The 2025 Foundation Mentoring Scheme will be a structured, one-to-one relationship that focuses on the needs of the mentored participant. The purpose of the scheme will be to support and encourage bursary recipients to reach their fullest potential and to develop their own vision for the future.

Mentoring will be provided by Chartered Bankers and other Chartered Banker Institute members who have 10 or more years' experience in the industry. Our mentors will provide guidance and understanding to bursary recipients and will also provide access to a professional network.

Workshops and events for 2025 Foundation supporters and mentees will be arranged so best practice advice and guidance can be shared – as well as bringing together the current and future generations of professional bankers. Mentors supporting a student below the age of 18 years may be required to complete a PVG (Protection of Vulnerable Groups) disclosure.

APPLICATION PROCEDURE

Completing the Application Form

The application form can be completed and submitted online, emailed to us or printed off posted to our head office. You can save the form as you complete it.

It is possible to submit both parts of your personal statement in writing in the relevant section in the application form or, if you prefer, by video (mp4 format) or audio (mp3 format). Videos and audios should be no more than 5 minutes long and can be uploaded via the 2025 section of our website www.charteredbanker.com. If you require the application form in a different format, please contact us. You do not need to answer the question about ethnic background but by providing an answer it helps us to ensure that we are acting fairly to all. Please answer all other questions and all information supplied throughout the form will be treated in the strictest confidence and in compliance with any GDPR legislation in force at the time of your application.

If you are applying straight from school, please ask your school to provide a reference for any result that you are expected to get in your forthcoming examinations. If your school cannot provide this, please include a copy of your prelim exam results as a guide for your predicted results.

If you are attending a college or university, please provide a copy of exam results for any courses already completed. Please ask your college/university to provide a reference for any result that you are expected to get in any forthcoming examinations.

Please provide details of any other relevant educational, vocational or voluntary experience relevant to this application.

Please provide the name of a referee with your application. If you are currently in education, the referee should be, if possible from your school, college or university. References should inform the 2025 Foundation Committee of your character and demonstrate that you would be likely to complete your course of study.

Please ensure you complete the “About You” section. The first part of this section should be completed in no more than 500 words and should be used to inform the Committee why you are applying for a bursary. There is no right or wrong way to complete this section but the Committee are keen to gain an understanding of your background so the following could be included:

- How a 2025 Foundation Bursary will make a difference to you and your studies
- Career aspirations.

Please complete the second part of the “About You” section in no more than 500 words. This part of the section should help demonstrate your understanding of the values and the behaviours expected from banking students and future bankers, such as integrity, respect and fairness. There is no right or wrong way to complete this section, but the following could be included:

- Any relevant experience
- Other information about your character and interests.

CONSIDERATION AND CONFIRMATION OF BURSARY AWARD

Consideration of the application will be made by the 2025 Foundation Committee and other advisors that they may consider appropriate. The Trustees may, at this stage, seek a mentor for the applicant and that mentor may contact the applicant to discuss the application further.

TERMS AND CONDITIONS

Applications will only be accepted from individuals who are intending to gain a professional banking qualification with the Institute and/or one of the Institute's learning partners. Further information can be found on our website under 'Our Qualifications' and 'Our Partners' section.

Please note that financial assistance will be restricted to individuals currently living in the UK (and who have been living in the UK for at least 3 years prior to making an application) only. We regret we will not be able to offer assistance to overseas students.

2025 Foundation Bursary awardees will be required to provide proof of individual or parental income in the form of P60 or Evidence that you are in receipt of Educational Maintenance Allowance (EMA) or 16–19 Bursary Fund. Bursaries will not be awarded until we are in receipt of one of the above documents.

2025 Foundation Bursary recipients are required to take part in the 2025 Foundation Mentoring Scheme. If the recipient leaves the mentoring scheme without the permission of the 2025 Foundation Trustees, then future bursary payments will cease.

2025 Foundation Bursaries are awarded for the duration of the chosen course. For courses longer than a year's duration, bursary recipients will be required to demonstrate that they are progressing from year to year and meeting a high academic standard. Bursary recipients authorise the 2025 Foundation Trustees to obtain a copy of any course assessment results and, for courses with multiple assessments, those results must show that the student is capable of passing the course. If a recipient fails to meet these academic standards then the 2025 Foundation Trustees will investigate, and if necessary, stop any and all future bursary payments.

2025 Foundation Bursary recipients are required to take part in 2025 Foundation marketing and fundraising activities. This will not be an onerous task and will be limited to the occasional picture and interview by the 2025 Foundation about their progress and consent to being named in 2025 Foundation literature.

Upon being awarded a 2025 Foundation bursary, successful applicants will be sent a contract to sign that they understand and agree to the Terms & Conditions outlined above and that failure to adhere to them may lead to their bursary award being withdrawn.

Completed Applications can be

Submitted online via the website

Emailed to 2025@charteredbanker.com or

printed and posted to

2025 Foundation

Chartered Banker Institute

38b Drumshuegh Gardens

Edinburgh

EH3 7SW

Please contact Yasemin Guven if you have any questions about the 2025 Foundation Bursary, mentoring scheme or application form.

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Chartered Banker Institute
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