

**CONFIDENTIAL**

# Financial declaration in support of application for Executive Principal Scholarship or Financial Support



## TO APPLY PLEASE:

- answer all questions and provide all information asked for
- complete the document checklist

Incomplete applications risk not being considered.

Where you are unsure what is required, please contact the Christ's College Finance Manager on 03 364 8693.

## SECTION 1

(A) Boy's name: \_\_\_\_\_ Date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_  
(First and last name)

Is father an Old Boy? YES / NO

If yes, please provide College number: \_\_\_\_\_

(B) Applicant's name: \_\_\_\_\_ Partner's name: \_\_\_\_\_

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

Phone: \_\_\_\_\_

Occupations (Applicant & Partner) \_\_\_\_\_

Relationship to boy: \_\_\_\_\_

(C) Current School: \_\_\_\_\_ Year group: \_\_\_\_\_

**(D) OTHER SIBLINGS**

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Proposed Primary or Prep School: \_\_\_\_\_

Present school: \_\_\_\_\_ Proposed Secondary: \_\_\_\_\_

If at university, provide value of assistance given: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Proposed Primary or Prep School: \_\_\_\_\_

Present school: \_\_\_\_\_ Proposed Secondary: \_\_\_\_\_

If at university, provide value of assistance given: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Proposed Primary or Prep School: \_\_\_\_\_

Present school: \_\_\_\_\_ Proposed Secondary: \_\_\_\_\_

If at university, provide value of assistance given: \_\_\_\_\_

Name: \_\_\_\_\_ Age: \_\_\_\_\_

Proposed Primary or Prep School: \_\_\_\_\_

Present school: \_\_\_\_\_ Proposed Secondary: \_\_\_\_\_

If at university, provide value of assistance given: \_\_\_\_\_

**(E) If any siblings are boys, have they been enrolled at College? YES / NO**

## SECTION 2

### TAXABLE INCOME

Taxable income for yourself, your partner and any related entities as assessed by the Inland Revenue Department (IRD)

- (A) Please provide these documents which certify family taxable income for the previous financial year
- a Personal Tax Summary
  - a Summary of Earnings
  - IR3 as filed with IRD
- (B) For all associated entities (company, partnership, rental property or Trust), related to yourself or your partner, provide the previous year's full financial statements including notes to the financial statements and the applicable filed tax return

*Note: where any succeeding income tax year is materially complete at the time of scholarship application, College may request a current draft trial balance for any associated entity*

- (C) Are there any unusual items affecting your previous income which should be taken into consideration?  
YES / NO

If yes, please detail:

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- (D) For the next financial year will your total income:

☐

Reduce

☐

Increase

☐

Stay the same

If your total income could change, please estimate the revised gross household income:

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### ADDITIONAL INCOME THAT IS NOT TAXED

- (E) List any non-taxed payments that the household may receive for the year in which the boy commences
- other Scholarships or grants awarded or applied for
  - private arrangements to support the boy

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Continue to Section 3

## SECTION 3

**(A) INCOME RETURNED FOR TAX PURPOSES TO 31 MARCH 20**  
**(For both individuals and related parties)**

Salary or wages	\$ _____
Interest / dividends	\$ _____
Business, partnership or Trust income	\$ _____
Other – Please specify <i>(e.g. rents from investment property or holiday homes etc)</i>	\$ _____
<b>Total income received</b>	<b>\$ _____</b>

**(B) FAMILY NET WORTH**

## ASSETS

Home owned ( <i>rateable valuation</i> )	\$ _____
Rental property ( <i>rateable valuation</i> )	\$ _____
Holiday Home ( <i>rateable valuation</i> )	\$ _____
Motor Vehicles – Make and Model: _____	\$ _____
– Make and Model: _____	\$ _____
Caravan ( <i>resale value</i> )	\$ _____
Boat ( <i>resale value</i> )	\$ _____
Business – Net Assets ( <i>attach full financial statements</i> ) <i>(provide proof of shareholding where you are a shareholder in the business)</i>	\$ _____
Any other assets _____ _____	
_____	\$ _____
<b>Physical Assets sub total</b>	<b>\$ _____</b>

## INVESTMENTS

Shareholding <i>(estimated value)</i>	\$ _____
Deposits, Bonds, Shares	\$ _____
Loans & Advances <i>(money lent to others)</i>	\$ _____
<b>Investments sub total</b>	<b>\$ _____</b>

**Total Assets** \$ \_\_\_\_\_  
(Total of assets, investments)

## LIABILITIES

List the debt owing at the time of completing this application

Mortgages (*secured on:* \_\_\_\_\_) \$ \_\_\_\_\_

Other loans/liabilities (*including business loans*)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\$ \_\_\_\_\_

**Total liabilities**

\$ \_\_\_\_\_

**Documents required:** Documents to confirm your declared debt eg: bank statement.

Any debt not confirmed with supporting documents risks not being counted as part the final assessment of your net worth.

## SECTION 4

### TRUSTS – all Trusts including Discretionary trusts and those holding let properties

(A) Is the boy and/or any of the applicants beneficiaries of a Trust? YES / NO

How many Trusts are the boy and/or applicant(s) beneficiaries of? \_\_\_\_\_

What type of Trust(s) are these?

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(B) Please give details of the total value of any assets and liabilities in the Trust(s) in the previous financial year

ASSETS	VALUE	LIABILITIES	VALUE
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____
_____	\$ _____	_____	\$ _____

(C) TOTAL TAXABLE (GROSS) INCOME RECEIVED FOR THE PREVIOUS FINANCIAL YEAR

Boy \$ \_\_\_\_\_

Applicant \$ \_\_\_\_\_

Please provide other relevant information you want to share here

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Please provide verification of the income the boy or the applicant(s) receive from the Trust by way of full Financial Statements for the Trust(s) and Trust tax return.

Continue to Section 5

## SECTION 5

### GENERAL

- (A) If you have children at other Independent Schools (Section 1D) have they been awarded any Scholarship or Bursary assistance? YES / NO
- If yes, please provide the value \$ \_\_\_\_\_
- If no, has any application for assistance ever been made? YES / NO
- (B) Have you, or do you intend to make an application for assistance for your son to any other body? YES / NO
- If yes, to whom?
- \_\_\_\_\_
- (C) What total level of assistance from all sources do you estimate you would require to enable your son to commence at College next year? \$ \_\_\_\_\_

### NOTES

1. Any award is subject to satisfactory progress and behaviour on the part of the boy for which this application is made.
2. Any award is made on the understanding that the balance of fees and disbursements are paid in full by the relevant due date.
3. It is essential that full details of your spouse's income and assets are supplied in the appropriate sections above.

I confirm that the information I have provided on this form is true, accurate and complete.

Signature of Applicant: \_\_\_\_\_

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

*Information is requested in this application solely for the purpose of assessing the applicant's eligibility for financial assistance.*

*The information will be assessed by College's Finance staff. It will not be disclosed to any third party unless specifically authorised by the applicant, or to meet legal obligations stipulated by the Privacy Act (2020).*

*The applicant has a right to access and correct any personal information held by College.*

*Once assessment has been made of the applicant's eligibility for financial assistance, this information will be destroyed.*

Continue to Checklist

## DOCUMENT CHECKLIST

HAVE YOU PROVIDED THE FOLLOWING TO SUPPORT YOUR APPLICATION?

- ☐ Personal Tax Summary for all applicants
- ☐ Summary of Earnings for all applicants including Trusts where applicable
- ☐ Related IR3 and Notice of Assessment

### Personally and for all related entities including Trusts

- ☐ Current Council Rating Value (RV) for all property or land owned or partly owned
- ☐ Documents to verify the current value of liabilities e.g current mortgage statement
- ☐ Full Financial Statements for any entity you have a financial interest in

## GUIDELINES

### Taxable Income

Taxable income may have been received from:-

- Wages, salary, benefits, NZ & overseas pensions, ACC payments
- Farm and business income
- Self employment
- Interest or dividends
- Rental income

A Personal Tax Summary (PTS) can be requested through [myirservices](https://myirservices.govt.nz) at [www.ird.govt.nz](http://www.ird.govt.nz)

Likewise a Summary of Earnings detailing income from employment, benefits, pension and schedular payments is also available at [myirservices](https://myirservices.govt.nz). This document will not show income from non-employment sources (e.g. rents or interest).

An IR3 and related notice of assessment excludes income from sources other than salary, wages, interest or dividends. An IR3 will state rent, self-employment and business income.

### Trusts

There are broad and complex ranges of Trust types and different ways you can benefit. Key factors that will be assessed include income currently received from Trusts, an individual's worth in that Trust and assets that may be received from Trusts in the future.