

CONFIDENTIAL

**FINANCIAL STATEMENT IN SUPPORT OF
APPLICATION FOR EXECUTIVE PRINCIPAL'S SCHOLARSHIP**

PART A

1. (a) NAME AND ADDRESS
OF APPLICANT

TELEPHONE

(b) OCCUPATION

(c) RELATIONSHIP TO BOY

2. (a) BOY'S NAME

(b) DATE OF BIRTH

3. (a) IS FATHER AN OLD BOY?

YES / NO

(b) IF YES, COLLEGE NUMBER

4. CURRENT SCHOOL

YEAR GROUP

5. OTHER CHILDREN

	Son/ daughter	Son/ daughter	Son/ daughter	Son/ daughter
Name				
Age				
Proposed Primary or Prep, or				
Present School				
& Proposed Secondary				

6. IF BOYS, HAVE THEY BEEN
ENROLLED AT COLLEGE?

YES / NO

PART B

1. IF ANNUAL ACCOUNTS ARE PREPARED

(a) Please supply copy for last financial year.

(b) Are results for current year likely to be significantly different? YES / NO

If yes, please detail:

(c) Are there any unusual items affecting the Accounts which should be taken into consideration? If yes, please detail:

YES / NO

(d) Please supply name, address & telephone number of Accountant or Solicitor to whom the Board may make an approach for clarification of Accounts.

(e) In addition to income disclosed by accounts, including family Trusts, is any further income received by you or other members of the family which is available for education or maintenance of children?

YES / NO

If yes, please detail in "Part C" No.3

(f) In addition to assets disclosed by accounts please detail in "Part C" No.2 any further assets or liabilities.

2. IF ANNUAL ACCOUNTS ARE **NOT** SUPPLIED

(a) Please supply in "Part C" No.1 details of income returned for taxation purposes to 31 March last.

(b) Is income for current year likely to be significantly different? YES / NO.

If yes, please detail:

(c) In addition to income returned for tax purposes is any further income received by you or other members of the family, including family Trusts, available for education or maintenance of children?

YES/NO

(If yes, please detail in "Part C" No.3)

PART C

1. INCOME RETURNED FOR TAX PURPOSES TO 31 MARCH 20.....

SALARY OR WAGES	\$	
DIVIDENDS RECEIVED	\$	
INTEREST RECEIVED	\$	
SHARE BUSINESS OR PARTNERSHIP INCOME	\$	
OTHER – Please specify (e.g. rents, etc)	\$	_____
<u>TOTAL INCOME RECEIVED</u>		\$ _____

Please supply a copy of the tax return.

2. SCHEDULE OF ASSETS AND LIABILITIES

ASSETS

HOUSE PROPERTY - RATEABLE VALUATION	\$	_____
RENTAL PROPERTY " "	\$	_____
HOLIDAY HOME " "	\$	_____
MOTOR VEHICLES - Make and Model	\$	_____
- Make and Model	\$	_____
CARAVAN – Estimated value	\$	_____
BOAT " "	\$	_____
BUSINESS – Net assets as per annual accounts	\$	_____
ANY OTHER ASSETS (excluding furniture & effects but Including assets belonging to spouse)		

_____	\$	_____
<u>ASSETS SUB TOTAL</u>		\$ _____

INVESTMENTS

SHAREHOLDINGS – Estimated Value	\$	_____
DEBENTURES & DEPOSITS "	\$	_____
LOANS & ADVANCES " "	\$	_____
BANK DEPOSITS " "	\$	_____
<u>INVESTMENTS SUB TOTAL</u>		\$ _____

TOTAL ASSETS \$ _____
(Total of Income, Assets, Investments)

LIABILITIES

Mortgages (secured on _____) \$ _____

Other loans/liabilities

_____ \$ _____

TOTAL LIABILITIES \$ _____

SUMMARY

TOTAL ASSETS \$ _____

Less TOTAL LIABILITIES \$ _____

NET ASSETS \$ _____

3. INCOME OR MONEY RECEIVED NOT INCLUDED IN ACCOUNTS SUPPLIED OR RETURNED FOR TAX PURPOSES SUCH AS:

Note: Please write NIL on each line if appropriate

ANNUITIES/LEGACIES \$

LIFE INSURANCE \$

SPOUSE'S INCOME \$

BOARDING BURSARIES \$

ANY OTHER INCOME \$ _____

\$ _____

PART D

GENERAL

1. Are you assisting members of your family who are tertiary students? YES / NO
If yes, to what extent per annum? \$ _____

2. If you have children at other Independent Schools (Part A 6) are you receiving any Scholarship or Bursary assistance? YES / NO
If yes, - value \$ _____
If no, - has any application for assistance ever been made? YES/ NO

3. Have you, or do you intend to make application for assistance for your son to any other body? YES/NO
If yes, to whom?

4. 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 concerned.
2. Any award is made on the understanding that the balance of fees and disbursements are paid by due dates.
3. It is essential that full details of your spouse's income and assets are supplied in the appropriate sections above. (Part B 1.e or Part B 2c and Part C.2)

Have you attached the following?

- Business Accounts
- Personal tax returns
- Other supporting documentation

I certify that the above details are correct

Signature of Applicant _____

Date _____