Bursary Application Form

Financial Assistance Program 2021
Private and Confidential
Bursary Application - Means Tested
PRIVATE AND CONFIDENTIAL

Student’s Surname: ................................................................. Given Names: .................................................................

Date of Birth: ........................................................................ Known As: ........................................................................

Day / Month / Year

Academic Year in 2021: ........................................................ Day ☐ Boarder ☐

Residential Address: ........................................................................................................................................

................................................................................................................................................................. Postcode: .................................................................

Contact Details: Home Phone: .........................................................................................................................................................................................................................

Work Phone: .................................................................................................................................................................

Mobile: .................................................................................................................................................................

Email: .................................................................................................................................................................

Fax: .................................................................................................................................................................

FATHER / GUARDIAN (Please circle) .................................................................................................................................

Full Name: .................................................................................................................................................................

Title: .................................................................................................................................................................

Profession / Occupation: .................................................................................................................................................................

Employed by: .................................................................................................................................................................

MOTHER / GUARDIAN (Please circle) .................................................................................................................................

Full Name: .................................................................................................................................................................

Title: .................................................................................................................................................................

Profession / Occupation: .................................................................................................................................................................

Employed by: .................................................................................................................................................................

Occupation - Please tick

☐ Farmer / Grazier ☐ Agricultural Employee ☐ Other (details) _____________________________

☐ Rural Contractor ☐ Agricultural Services ________________________________________________

DETAILS OF DEPENDENTS: (School Age)

<table>
<thead>
<tr>
<th>Children’s Names</th>
<th>Educational Institution</th>
<th>Year</th>
<th>Date of Birth</th>
<th>Other Assistance eg. ICPA, Scholarships etc Names / Values</th>
</tr>
</thead>
</table>

Indicate if sole supporting parent: .................................................................................................................................................................................................
DETAILS FOR THE YEAR ENDED 30 JUNE 2020:

<table>
<thead>
<tr>
<th></th>
<th>FATHER</th>
<th>MOTHER</th>
<th>DEPENDENT CHILD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gross Salary</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Interest Received</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Gross Dividends</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Centrelink Pension / Allowance Type</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Private Trust Distribution Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Partnership Distribution (Loss)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Other Income (description)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Maintenance Payments</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Value of fringe benefits appearing on PAYG summary</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TAXABLE INCOME FOR THE YEAR ENDED 30 JUNE 2020:

<table>
<thead>
<tr>
<th></th>
<th>FATHER</th>
<th>MOTHER</th>
<th>DEPENDENT CHILD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Taxable Income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>(to be supported by certified copy of income tax assessments)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>to be received by 11 October 2020</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please attach details of any Centrelink payments, Government assistance or allowance being received.

Include details of any special tax allowances, farm management deposit balance or carried forward losses available. This includes elections regarding deferral of livestock trading profits.

Father, Mother or Dependent involved in a PRIVATE COMPANY
(Annexure A details circumstances where a person is involved). Please tick box.

☐ No
☐ Yes (please complete questionnaire at Annexure A)

Father, Mother or Dependent involved in a PRIVATE TRUST
(Annexure B details circumstances where a person is involved). Please tick box.

☐ No
☐ Yes (please complete questionnaire at Annexure B)
FAMILY FINANCIAL POSITION INCLUDING ALL PARTNERSHIP ASSETS AND LIABILITIES.  
ALL ASSETS TO BE AT MARKET VALUE.

### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>Value $ at 30 June 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land and Buildings (including private residence)</td>
<td></td>
</tr>
<tr>
<td>Plant and Equipment</td>
<td></td>
</tr>
<tr>
<td>Livestock</td>
<td></td>
</tr>
<tr>
<td>Market value of other assets and investments</td>
<td></td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td></td>
</tr>
</tbody>
</table>

### LIABILITIES

<table>
<thead>
<tr>
<th>Description</th>
<th>Value $ at 30 June 2020</th>
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</thead>
<tbody>
<tr>
<td>Loans from banks &amp; other financial institutions</td>
<td></td>
</tr>
<tr>
<td>Equipment Finance</td>
<td></td>
</tr>
<tr>
<td>Other liabilities</td>
<td></td>
</tr>
<tr>
<td>Credit Cards</td>
<td></td>
</tr>
<tr>
<td><strong>Total Liabilities</strong></td>
<td></td>
</tr>
</tbody>
</table>

Other payables *(please detail)* e.g. family loans, store cards, creditor accounts.

### ANNEXURE A - INVOLVEMENT IN A PRIVATE COMPANY

A person is involved in a Private Company if he/she or his/her partner:

- is a shareholder, director or other officeholder if the company;
- is owed money by the company;
- has provided, for less than market value, property or services to the company;
- are able to benefit from the company;
- can expect the director(s) of a company to act in accordance with their wishes, or;
- can expect the governing director or major shareholder to act in accordance with their wishes.

Where a parent or guardian has involvement in a **PRIVATE COMPANY**, the following information is required.

**DETAILS OF SHAREHOLDING OF EACH SHAREHOLDER:**

<table>
<thead>
<tr>
<th>FULL NAME</th>
<th>CLASS OF SHARE</th>
<th>NUMBER PURCHASED</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
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</table>

DETAILS ASSET HELD BY COMPANY AND CURRENT MARKET VALUE, INCLUDING LOANS TO PARENTS OR GUARDIAN:

<table>
<thead>
<tr>
<th>TYPE OF ASSET</th>
<th>MARKET VALUE</th>
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</thead>
<tbody>
<tr>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

Detail the liabilities of the company including loans from parents or guardians:

Net assets of company:

Taxable income:

ANNEXURE B - INVOLVEMENT IN A PRIVATE TRUST

A person is involved in a Private Trust if he/she or his/her partner:

- are the appointor, guardian or principal of the trust;
- are the trustee;
- are a shareholder or director of the trustee company;
- are a beneficiary or included among categories of beneficiaries;
- are a unit holder;
- are owed money by the trust;
- have provided, for less than market value, property or services to the trust;
- are able to benefit from the trust;
- can expect the trustee or appointor of a trust to act in accordance with their wishes.

Where a parent or guardian has involvement in a **PRIVATE TRUST**, the following information is required.
MARKET VALUE OF THE TRUST ASSETS
(excluding loans to family members):

<table>
<thead>
<tr>
<th>TYPE OF ASSET</th>
<th>MARKET VALUE</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

Balance of liabilities to banks and other providers of finance (other than family members and other related parties);

__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________

Balance of any loans owing to or from family members:

__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________

Total funds advanced by the trust to parent or guardian for the year:

__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________

INCOME SUMMARY:

Please provide details of any extenuating circumstances which may have caused your income to be higher or lower than usual in this taxation year:

__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________

Please provide details of any circumstances that may reduce your income in the 2019 / 2020 Tax Year:

__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________
__________________________________________________________________________________________________________________________________________________________

NOTE: Proof of Income is required
• by providing a copy of income tax assessments; including partnership, company, Trust and personal tax returns.
OR if not available;
• by providing a Certified statement from your accountant with projected income for the 2019 / 2020 Tax Year.
• these are to be certified by Financial Statements and tax returns when they become available.

The School reserves the right to request further financial information if required.
THE RESPONSIBILITY OF PROVIDING THIS INFORMATION LIES WITH THE APPLICANT.
APPLICATIONS WILL NOT PROCEED IF THIS INFORMATION IS NOT SUPPLIED.
SPECIAL CONDITIONS OF BURSARY AWARDS - 2021

1. Bursaries are awarded to students who intend to pursue studies at NEGS through to the completion of Year 12. Upon your acceptance of this award, NEGS will credit you with the value of this award proportionally each payment period.

Should you decide to terminate your daughter’s enrolment at the School prior to HSC for reasons other than exceptional circumstances, you may be required to repay to NEGS the entire amount that has been credited to your account.

2. Bursaries are subject to annual review by the School. Families are therefore required to submit their FULL FINANCIALS and TAX ASSESSMENTS to the Scholarships and Bursaries Committee for review by the 11th October each year.

3. Should the student change status from Day to Boarding or the reverse, then the Bursary award will be reviewed in light of the change of status.

4. All awards are made subject to the continuing satisfactory performance and behaviour of students. Bursary awards will be discontinued if the account is not kept up to date.

5. A family receiving Bursary assistance is not eligible for a sibling discount.

6. The nature and the condition of this Bursary are strictly confidential between the School and the applicant family.

PLEASE RETURN TO:
The Principal, NEGS, Uralla Road, ARMIDALE NSW 2350
by 11th October 2020

PLEASE CHECK THAT YOU HAVE:

☐ Answered all the questions

☐ Included Proof of Income details (partnership, Company, Trust, Personal)

☐ Read the Special Conditions of Bursary Awards

/  / 2020
Father

/  / 2020
Mother