



**The Scots College**  
Sydney Australia

## Bursary Review: Evidence of Financial Need – Strictly Confidential

### Detailed Evidence of Financial Need

Parent Name \_\_\_\_\_ Partner/Spouse Name \_\_\_\_\_  
(if applicable)

Current Residential Address \_\_\_\_\_ Current Residential Address \_\_\_\_\_  
(if not the same)

Student's Name \_\_\_\_\_ House \_\_\_\_\_ Current Year \_\_\_\_\_

Please provide the following supporting documentation:


1. Tax Returns **and** Notice of Assessments for the last 3 financial years (if you are married or in a de facto relationship, this should include the Tax Returns of both parents)

**Please complete the following:**



Do you (and/or your partner) own, or are buying a home. Yes / No	If yes, Current Market Value of Property <input type="text" value="\$"/> Current Mortgage, if any <input type="text" value="\$"/>
If yes, is the home on a block of land larger than 2 hectares Yes / No	
If yes, is the home on more than one title document Yes / No	
If yes, is any part of the home property used for income producing purposes Yes / No	





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<p>Do you (and/or your partner) have an interest in any other real estate in and/or outside Australia, whether used for private or investment purposes? Yes / No</p> <p>If yes, how many? _____</p>	<p>If yes, Total Current Market Value of Property(s)</p> <p>\$ <input type="text"/></p> <p>Total Current Mortgage(s), if any</p> <p>\$ <input type="text"/></p>
<p>What is the estimate of the current market value of your (and/or your partner's) household contents and personal effects?</p> <p>The current market value of an item is what you would get if you sold it – it is not the replacement or insured value. This includes furniture, antiques, works of art, jewellery for personal use and hobby collections etc</p>	<p>Current Market Value, net of any amount owed</p> <p>\$ <input type="text"/></p>
<p>Do you (and/or your partner) have a life insurance policy(s) that can be cashed in? Yes / No</p> <p> If yes, attach the policy document and the latest statement for each policy</p>	<p>If yes, Total Surrender Value</p> <p>\$ <input type="text"/></p>
<p>Do you (and/or your partner) own, partly own or have a financial interest in any motor vehicles, motor cycles, trailers, boats, caravans and/or motor homes? Yes / No</p>	<p>If yes, Current Total Market Value, net of any amount owed</p> <p>\$ <input type="text"/></p>






<p>Provide details of all accounts held by you (and/or your partner) in banks, building societies or credit unions. Include savings accounts, cheque accounts, term deposits, joint accounts, accounts you hold in trust or under any other name. Accounts and terms deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. Do not Include shares or managed investments</p> <table border="1" data-bbox="248 539 1624 750"><tr><td data-bbox="248 539 689 750">Name: Type: BSB #: Account #: Bal \$</td><td data-bbox="725 539 1167 750">Name: Type: BSB #: Account #: Bal \$</td><td data-bbox="1193 539 1624 750">Name: Type: BSB #: Account #: Bal \$</td></tr></table> <p> Attach proof of all account balances (e.g. ATM slips, statements etc. If you (and/or your partner) have more than 3 accounts attach a separate sheet with details</p>	Name: Type: BSB #: Account #: Bal \$	Name: Type: BSB #: Account #: Bal \$	Name: Type: BSB #: Account #: Bal \$	<p>Total Value of Account Balances</p> <p>\$ <input data-bbox="1727 544 2018 603" type="text"/></p>
Name: Type: BSB #: Account #: Bal \$	Name: Type: BSB #: Account #: Bal \$	Name: Type: BSB #: Account #: Bal \$		
<p>Provide details of any credit card and/or personal loan owed by you (and/or your partner). Include credit as well as store cards.</p> <table border="1" data-bbox="248 1066 1624 1276"><tr><td data-bbox="248 1066 689 1276">Financial Institution Type: Current Bal: Credit Limit:</td><td data-bbox="725 1066 1167 1276">Financial Institution Type: Current Bal: Credit Limit:</td><td data-bbox="1193 1066 1624 1276">Financial Institution Type: Current Bal: Credit Limit:</td></tr></table> <p> Attach proof of all loan balances (e.g. statements etc. If you (and/or your partner) have more than three loans/credit cards attach a separate sheet with details</p>	Financial Institution Type: Current Bal: Credit Limit:	Financial Institution Type: Current Bal: Credit Limit:	Financial Institution Type: Current Bal: Credit Limit:	<p>Total Balance Owed</p> <p>\$ <input data-bbox="1727 1070 2018 1129" type="text"/></p>
Financial Institution Type: Current Bal: Credit Limit:	Financial Institution Type: Current Bal: Credit Limit:	Financial Institution Type: Current Bal: Credit Limit:		



<p>Provide details of any bonds or debentures held by you (and/or your partner). Bonds refer to government and semi government bonds. Bonds or debentures outside Australia should be included, noting the currency in which it is invested. Do not include friendly society bonds or life insurance bonds</p> <table border="1" data-bbox="248 507 1624 651"><tr><td data-bbox="248 507 689 651">Name of Co: Type: Invested: \$</td><td data-bbox="723 507 1164 651">Name of Co: Type: Invested: \$</td><td data-bbox="1182 507 1624 651">Name of Co: Type: Invested: \$</td></tr></table> <p> Attach a document which gives details for each bond or debenture. If you (and/or your partner) have more than 3 bonds or debentures attach a separate sheet with details</p>	Name of Co: Type: Invested: \$	Name of Co: Type: Invested: \$	Name of Co: Type: Invested: \$	<p>Total Value of Amount Invested</p> <p>\$ <input data-bbox="1727 507 2018 568" type="text"/></p>
Name of Co: Type: Invested: \$	Name of Co: Type: Invested: \$	Name of Co: Type: Invested: \$		
<p>Do you (and/or your partner) have money on loan to another person or organisation? Yes / No Include all loans, whether they are made to family members, other people or organisations or trusts</p>	<p>If yes, Total Value of Loans</p> <p>\$ <input data-bbox="1727 866 2018 927" type="text"/></p>			
<p>Provide details of any shares, options, rights, convertible notes or other securities listed on the Australian securities exchange or a stock exchange outside Australia. Do not include managed investments.</p> <table border="1" data-bbox="248 1110 1624 1254"><tr><td data-bbox="248 1110 689 1254">Name of Co: Number Shares: ASX code: (if known)</td><td data-bbox="723 1110 1164 1254">Name of Co: Number Shares: ASX code: (if known)</td><td data-bbox="1182 1110 1624 1254">Name of Co: Number Shares: ASX code: (if known)</td></tr></table> <p> Attach latest statement for each share holding. If you (and/or your partner) have more than three share holdings, attach a separate sheet with details</p>	Name of Co: Number Shares: ASX code: (if known)	Name of Co: Number Shares: ASX code: (if known)	Name of Co: Number Shares: ASX code: (if known)	<p>Estimated Current Value of Holdings</p> <p>\$ <input data-bbox="1727 1110 2018 1171" type="text"/></p>
Name of Co: Number Shares: ASX code: (if known)	Name of Co: Number Shares: ASX code: (if known)	Name of Co: Number Shares: ASX code: (if known)		



<p>Provide details of any shares, options or rights in Public companies NOT listed on a stock exchange? Do not include managed investments.</p> <table border="1" data-bbox="248 466 1603 608"><tr><td data-bbox="248 466 689 608">Name of Co: Type of Share: Number Shares:</td><td data-bbox="705 466 1146 608">Name of Co: Type of Share: Number Shares:</td><td data-bbox="1162 466 1603 608">Name of Co: Type of Share: Number Shares:</td></tr></table> <p> Attach latest statement for each share holding. If you (and/or your partner) have more than three share holdings, attach a separate sheet with details</p>	Name of Co: Type of Share: Number Shares:	Name of Co: Type of Share: Number Shares:	Name of Co: Type of Share: Number Shares:	<p>Estimated Current Value of Holdings</p> <p>\$ <input data-bbox="1727 472 2018 531" type="text"/></p>
Name of Co: Type of Share: Number Shares:	Name of Co: Type of Share: Number Shares:	Name of Co: Type of Share: Number Shares:		
<p>Provide details of any managed investments in and/or outside Australia. Include investment trusts, personal investment plans, life insurance bonds and friendly society bonds. Do not include conventional life insurance policies, superannuation or rollover investments.</p> <table border="1" data-bbox="248 954 1603 1096"><tr><td data-bbox="248 954 689 1096">Name of Co: Product: Current Value \$</td><td data-bbox="705 954 1146 1096">Name of Co: Product: Current Value \$</td><td data-bbox="1162 954 1603 1096">Name of Co: Product: Current Value \$</td></tr></table> <p> Attach documents which give details for each investment. If you (and/or your partner) have more than three managed investments, attach a separate sheet with details</p>	Name of Co: Product: Current Value \$	Name of Co: Product: Current Value \$	Name of Co: Product: Current Value \$	<p>Total Current Market Value</p> <p>\$ <input data-bbox="1727 954 2018 1013" type="text"/></p>
Name of Co: Product: Current Value \$	Name of Co: Product: Current Value \$	Name of Co: Product: Current Value \$		
<p>Provide details of any money invested in, or income received from any other investments not declared elsewhere on this form.</p> <p> Attach documents which give details for each investment.</p>	<p>Total Current Value of Investment</p> <p>\$ <input data-bbox="1727 1342 2018 1401" type="text"/></p>			



<p>In the last 12 months, have you or your partner received a lump sum payment that you have not already advised on this form. Include compensation, insurance or damages lump sum payments. Yes / No</p> <p>Attach documents which give details.</p>	<p>If yes, Amount paid</p> <p>\$ <input type="text"/></p>
<p>In the last 5 years, have you or your partner given away, sold for less than their market value, or surrendered a right to any cash, assets, property or income. Include forgiven loans and shares in private companies. Yes / No</p> <p>If yes, attach documents which give details.</p>	<p>If yes, Value</p> <p>\$ <input type="text"/></p>
<p>Are you or have you (and/or your partner) been involved in a private trust (includes a non-complying SMSF)?</p> <p>Attach documents which give details.</p>	<p><input type="text" value="Yes / No"/></p>
<p>Are you or have you (and/or your partner) been involved in a private company?</p> <p>Attach documents which give details.</p>	<p><input type="text" value="Yes / No"/></p>
<p>Are you or have you (and/or your partner) involved in any type of business? Include farming, self employed, sole trader, partnership, sub contractor</p> <p>Attach documents which give details.</p>	<p><input type="text" value="Yes / No"/></p>
<p>Will you be eligible to claim the AIC (Assistance for Isolated children) for child in application</p>	<p><input type="text" value="Yes / No"/></p>



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Is the family farming property subject to Exceptional Circumstances declaration?	<input type="text" value="Yes / No"/>																
Are you and/or your partner members of any clubs such as private golf clubs, sailing clubs etc?  Attach documents which give details.	<input type="text" value="Yes / No"/>																
<p>Siblings Private School Fees</p> <table border="1"><thead><tr><th data-bbox="241 683 434 711">Name of School</th><th data-bbox="685 683 864 711">Academic Year</th><th data-bbox="1039 683 1234 711">Annual Fee Paid</th><th data-bbox="1386 683 1585 711">Value of Bursary</th></tr></thead><tbody><tr><td data-bbox="203 767 584 791">1. _____</td><td data-bbox="674 767 853 791">_____</td><td data-bbox="1028 767 1207 791">_____</td><td data-bbox="1375 767 1554 791">_____</td></tr><tr><td data-bbox="203 839 584 863">2. _____</td><td data-bbox="674 839 853 863">_____</td><td data-bbox="1028 839 1207 863">_____</td><td data-bbox="1375 839 1554 863">_____</td></tr><tr><td data-bbox="203 911 584 935">3. _____</td><td data-bbox="674 911 853 935">_____</td><td data-bbox="1028 911 1207 935">_____</td><td data-bbox="1375 911 1554 935">_____</td></tr></tbody></table>	Name of School	Academic Year	Annual Fee Paid	Value of Bursary	1. _____	_____	_____	_____	2. _____	_____	_____	_____	3. _____	_____	_____	_____	
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1. _____	_____	_____	_____														
2. _____	_____	_____	_____														
3. _____	_____	_____	_____														







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## Declaration

By signing here you acknowledge that you have read and understood the Privacy & Collection notices on the College's website and declare that the details contained in this application are true and correct. You further declare that you envisage no change in your financial circumstances in the foreseeable future.

In addition to the above, you give permission to The Scots College to contact and verify financial information with relevant credit reporting agencies, debt collection agencies, insurers and third parties such as your employer/accountant to check that the information provided is true and correct. In the event your application for a bursary is unsuccessful you understand that any Personal Information you have provided may be retained.

_____	_____	_____ 
Parent Name	Date	Signature
_____		_____ 
Name of Witness		Signature
_____	_____	_____ 
Partner/Spouse Name (if applicable)	Date	Signature
_____		_____ 
Name of Witness		Signature

All information received is held in the strictest confidence. Please ensure all documents are sent to the  
The Scots College  
Finance Department  
Locked Bag 5001  
Bellevue Hill NSW 2023