



# PLC ARMIDALE

## McLaren Trust

# BURSARY APPLICATION

INCOME INFORMATION (PRIVATE & CONFIDENTIAL)	
<b>NAME OF STUDENT/S:</b>	YEAR: _____ IN 20____ * DAY / BOARDER (please circle)
<b>ADDRESS:</b>	POSTCODE:
<b>PHONE:</b>	(H): _____ (W): _____
<b>MOBILE:</b>	
<b>EMAIL:</b>	
<b>FATHER'S NAME:</b>	
<b>OCCUPATION:</b>	*SELF EMPLOYED / EMPLOYED
<b>MOTHER'S NAME:</b>	
<b>OCCUPATION:</b>	*SELF EMPLOYED / EMPLOYED

- Are you a PLC old girl? **YES / NO**
- Are you a member of the clergy? **YES / NO**
- Are you a sole supporting parent? **YES / NO**
- If you are a primary producer, are you in an Exceptional Circumstance Area?  
(If Yes, please provide a copy of confirmation from the Government) **YES / NO**
- Are you eligible for Assistance to Isolated Children? **YES / NO**
- Are you a member of the ICPA? **YES / NO**

## DETAILS OF DEPENDANTS

CHILD'S NAME	EDUCATIONAL INSTITUTION	YEAR	DOB	OTHER FINANCIAL ASSISTANCE BEING INSTITUTION RECEIVED (NAME & VALUE) EG youth allowance, scholarships, bursaries

### A. DETAILS FOR THE PREVIOUS YEAR ENDED 30 JUNE 20xx

#### 1. Gross Earnings

	FATHER	MOTHER	DEPENDANT CHILD
1.1 Gross Salary Wages			
1.2 Interest Received			
1.3 Gross Dividends			
1.4 Centrelink Pension/ Allowance Type			
1.5 Private Trust Distribution Income			
1.6 Partnership Distribution (loss)			
1.7 Other Income (Description)			
A. Maintenance Payments			
B. Value of fringe benefits appearing on PAYG Payment Summary			

**TAXABLE INCOME FOR THE PREVIOUS YEAR ENDED 30 JUNE 20**

	FATHER	MOTHER	DEPENDENT CHILD
Taxable Income (Please provide copies of personal income tax returns and supporting schedules and copy of assessment.)			

**PLEASE ATTACH THE FOLLOWING:**

- a) Details of any Centrelink Payments, Government Assistance or Allowances being received including Family Tax Benefits - Part A and B
- b) Copy of Partnership Financial Statements including detailed profit and loss, balance sheet, livestock trading statements, notes to the accounts and equity accounts.

**B. FAMILY FINANCIAL POSITION INCLUDING ALL PARTNERSHIP ASSETS AND LIABILITIES. ALL ASSETS TO BE AT MARKET VALUE.**

<b>ASSETS</b>	<b>\$</b>
Land and Buildings (including private residence)	_____
Plant and Equipment	_____
Livestock	_____
Market value of other assets and investments (eg interest bearing deposits, shares etc)	_____
<b>LIABILITIES</b>	
Loans from banks or other financial institutions	_____
Other payables	_____
<b>TOTAL LIABILITIES</b>	_____
<b>NET ASSETS (Total Assets less Total Liabilities)</b>	_____

**OTHER PAYABLES (please detail)**

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**C. DETAILS OF ANY DEFERRED LIVESTOCK PROFITS, FARM MANAGEMENT DEPOSITS, OR CARRY FORWARD LOSSES AVAILABLE**

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**D. ARE YOU A SOLE PROPRIETOR? YES / NO**

If yes, you will need to provide details of your financial statements and details of your financial position including all assets and liabilities. All assets to be at market value.

**Please attach copies of the documentation mentioned above**

<b>ASSETS</b>	<b>\$</b>
Land and Buildings (including private residence) Plant and Equipment Livestock	
Market value of other assets and investments (eg Interest Bearing Deposits, Shares etc)	
<b>TOTAL ASSETS</b>	
<b>LIABILITIES</b>	
Loans from banks or other financial institutions	
Other payables	
<b>TOTAL LIABILITIES</b>	
<b>NET ASSETS (Total Assets less Total Liabilities)</b>	

**E. IS FATHER, MOTHER OR DEPENDENT INVOLVED IN A PRIVATE COMPANY?**

**(Annexure A details circumstances where a person is involved). Please indicate**

**YES / NO**

(If YES, please complete questionnaire at Annexure A)

**F. IS FATHER, MOTHER OR DEPENDENT INVOLVED IN A PRIVATE TRUST**

**(Annexure B details circumstances where a person is involved).**

**YES / NO**

(If YES, please complete questionnaire at Annexure A)

**G. Please provide details below of any other financial information which needs to be considered in assessing this Bursary application. For example will grandparents or other persons/institutions be providing ongoing financial assistance to meet fee commitments?**

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**H. Do you consider your financial circumstances will materially change for the year the Bursary relates to?**

**YES** (please provide details below)

**NO**

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## ANNEXURE A

### Involvement in a Private Company

A person is involved in a private company if they or their partner:

- are a shareholder, director or other officeholder of the company
- are owed money by the company
- have 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 for the previous year ended 30 June 20\_\_\_\_\_.

1. Details of shareholding of each shareholder

FULL NAME	CLASS OF SHARE	NUMBER	PURCHASE PRICE

2. Provide a copy of last financial statements prepared including; detailed Profit and Loss, Balance Sheet and Notes to Accounts
3. Current Market Value of Assets (estimated if necessary)
4. Details of loans to/from parents and/or guardians or associates thereof.
5. Company Tax Return

## ANNEXURE B

### Involvement in a Private Trust

A person is involved in a private trust if they or their 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 the 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 for the previous year ended 30 June 20\_\_\_\_\_.

1. Provide copy of last financial statements prepared including; Detailed Profit and Loss, Balance Sheet and Notes to the accounts.
2. Balance of any loans owing to/from parents or guardians or associates thereof.

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3. Current Market Value of Assets (estimated if necessary)

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4. Total funds advanced by the trust for the year to parent, guardian, or associate

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5. Tax return including any distribution statements

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

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Applicable documents to be attached to this application (copies only please):

- Income Tax Returns
- Financial Statements
- ATO Assessments
- Details of Centrelink benefits, as provided by Centrelink
- Exceptional Circumstances Certificate

**All documents are retained by the school and will be disposed of. Please do not submit original documents**

<b>SIGNED (FATHER/CARER):</b>	
<b>DATE:</b>	
<b>SIGNED (MOTHER/CARER):</b>	
<b>DATE:</b>	

**Please return to:**

The Business Manager  
Private and Confidential  
PLC Armidale  
Locked Bag 5  
ARMIDALE NSW 2350

**Please check - have you:**

- Answered all questions?
- Signed and dated the above?
- Included Proof of Income details as per checklist above?