



Strictly Confidential

Bursary Assistance Scheme  
Statement of Financial Circumstances

\*Please ensure you read document 'Bursary Assistance Scheme – Policy & Procedure for Academic Year 2017-18' before completing this form

1. Child (to whom the application refers)

- a) Full Name: \_\_\_\_\_
- b) Date of Birth: \_\_\_\_\_
- c) Current Year / Form: \_\_\_\_\_ Or Proposed Date of Entry: \_\_\_\_\_

Notes for Completion

2. Parents / Guardian

Father/Step-Father/Guardian

Mother/Step-Mother/Guardian

- a) Full Name \_\_\_\_\_
- b) Residential Address \_\_\_\_\_  
\_\_\_\_\_
- c) Home Tel \_\_\_\_\_
- d) Mobile Tel: \_\_\_\_\_
- e) HKID/Passport No \_\_\_\_\_

Definitions:

Parents – either the natural Mother or natural Father and/or partner as appropriate who lives in the same dwelling as the child/children the application refers to

Guardian – a guardian appointed by a court with appropriate jurisdiction over the child the application refers to plus any partner living in same dwelling

Residential Address – the domestic unit where the child resides with parents / guardian

f) Occupation \_\_\_\_\_

g) Work Status:      Employed/Self-Employed/Unemployed/Retired      Employed/Self-Employed/Unemployed/Retired\*

\*delete as appropriate

h) Name of Employer \_\_\_\_\_

i) Employer's Address \_\_\_\_\_  
\_\_\_\_\_

j) Are either of you Director(s) or Partners of this Company or Business? If yes please state % owned.

YES  .....%      NO       YES  .....%      NO

Siblings / Other Children less than 21 years old:

i) Name \_\_\_\_\_ Age \_\_\_\_\_ DOB \_\_\_\_\_  
School /University (currently) \_\_\_\_\_

ii) Name \_\_\_\_\_ Age \_\_\_\_\_ DOB \_\_\_\_\_  
School /University (currently) \_\_\_\_\_

iii) Name \_\_\_\_\_ Age \_\_\_\_\_ DOB \_\_\_\_\_  
School /University (currently) \_\_\_\_\_

iv) Name \_\_\_\_\_ Age \_\_\_\_\_ DOB \_\_\_\_\_  
School /University (currently) \_\_\_\_\_

Note: These siblings / other children need not be staying at the same residential address but are under your care / dependency / guardianship and for whom you are responsible for maintenance, keep, Tuition Fees, etc.

3. Earnings & Income	Father/Step-Father/Guardian	Mother/Step-Mother/Guardian
a) Salary/Remuneration	HK\$_____per/year	HK\$_____per/year
b) Paid Allowances	HK\$_____per/year	HK\$_____per/year
c) Benefits in Kind (i)	_____	_____
(ii)	_____	_____
(iii)	_____	_____
d) Profit from Business		
Trading Activities	HK\$_____per/year	HK\$_____per/year
e) Pension/Annuity	HK\$_____per/year	HK\$_____per/year
f) Bank Interest	HK\$_____per/year	HK\$_____per/year
g) Shares/Dividends	HK\$_____per/year	HK\$_____per/year
h) Property Income	HK\$_____per/year	HK\$_____per/year
i) Maintenance Allowance	HK\$_____per/year	HK\$_____per/year
j) Capital Gains	HK\$_____per/year	HK\$_____per/year
k) Other (Specify)		
	HK\$_____per/year	HK\$_____per/year
	HK\$_____per/year	HK\$_____per/year

Section 3 should include earnings from all sources in the current fiscal year (April-March) and gross i.e. before taxation. Where the exact amounts are not yet due an estimate must be included (please mark with 'E').

All Income generated must be stated even if not earned or generated in Hong Kong (e.g. overseas property, shares, business profits).

Benefits in Kind should include assets, facilities and services given in the course of employment e.g. Company Cars, provision of accommodation, personal expenses, loan of company assets

Share of declared Taxable Net Profits

Amounts Receivable

Interest from all sources such as time deposits, bonds and similar

Incl. market value at the time of declaration

Incl. rental, lease, sub-letting income declared to tax authorities after the deduction of allowable expenses

Incl. amounts received under a court order or voluntary agreement (for the child)

Incl. net profit from sale of assets, such as shares, property, businesses, etc. in the current tax year

Include any other income not listed elsewhere in this section e.g. Trust Funds, Inheritance, etc. (specify accordingly)

4. Outgoings	Father/Step-Father/Guardian	Mother/Step-Mother/Guardian	
a) Tax Payable on Income Declared above	HK\$ _____	HK\$ _____	Section 4 should include all outgoings related to income stated in Section 3 (for current fiscal year April-March). Estimates must be included (please mark with 'E')
b) Contribution to Provident Funds / Superannuation	HK\$ _____	HK\$ _____	Include all tax as deducted at source
c) Mortgage Interest Payable			
Principal Residence	HK\$ _____	HK\$ _____	Include Capital repayments as well as interest. Separate between principal residence (if owned) and other
Other Residences	HK\$ _____	HK\$ _____	
d) Other Interest Payable	HK\$ _____	HK\$ _____	Include hire purchase and leases
e) Rent Payable	HK\$ _____	HK\$ _____	On Principal residence if not owned
f) Alimony or Other Family Maintenance Payments	HK\$ _____	HK\$ _____	Subject to court order
g) Other (Specify)			
	HK\$ _____	HK\$ _____	Do <u>not</u> include household expenses, but do include school or university tuition fees
	HK\$ _____	HK\$ _____	
	HK\$ _____	HK\$ _____	

5. Capital Assets

Father/Step-Father/Guardian

Mother/Step-Mother/Guardian

Approximate Market Value of:

a) Principal Residence	HK\$ _____	HK\$ _____
b) Other Property Owned	HK\$ _____	HK\$ _____
c) Bank Deposits	HK\$ _____	HK\$ _____
d) Shares, Equity, Bonds etc.	HK\$ _____	HK\$ _____
e) Cash at Bank /Other	HK\$ _____	HK\$ _____
f) Net Worth or Market Value of businesses owned or shared-ownerships	HK\$ _____	HK\$ _____
g) Other (Specify)		
_____	HK\$ _____	HK\$ _____
_____	HK\$ _____	HK\$ _____
_____	HK\$ _____	HK\$ _____

Leave blank if not owned. Estimate if no recent market value available (and denote with 'E')

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Include significant individual assets owned with a value greater than HK\$200,000 e.g. car, boat, household contents, etc.

Please state why none of the assets stated cannot be liquidated/sold to be put towards supporting school fees

Note: this statement will be given close scrutiny at the consideration stage and you may be challenged accordingly.

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6. Capital Liabilities

a) Mortgage on Principal Residence: Amount Outstanding HK\$ \_\_\_\_\_  
Settlement Date \_\_\_\_\_

Estimate if no recent market value available  
(and denote with 'E')

b) Other (Specify)	Father/Step-Father/Guardian	Mother/Step-Mother/Guardian
_____	HK\$ _____	HK\$ _____
_____	HK\$ _____	HK\$ _____
_____	HK\$ _____	HK\$ _____

7. Supporting Statement (compulsory) – Please outline specifically ‘financial, compassionate, or other pertinent factors’ that should be taken in to account. In the case of a current Kellett student, please specify any change of circumstances that has prompted the application

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\* Use a separate sheet if necessary

Declaration by Applicant(s)

I / we, \_\_\_\_\_, have read and fully understood the information in the Bursary Application Policy. I declare that the information provided by me in the application form is complete and true to the best of my knowledge. I understand and accept that failure to withhold or declare inaccurately any information will lead to the immediate withdrawal of any offer or current award of a Bursary– and furthermore could jeopardise any relevant place at Kellett School. Should there be a change in family circumstances, I will immediately inform Kellett School of such change in writing.

Signature of Applicant(s): \_\_\_\_\_

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

\_\_\_\_\_

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