

# Financial Assistance Scholarship Application Form

**Completed application forms must be returned to the Principal at the enrolment interview or as soon as practical thereafter (but before 11 September 2020), along with a completed Enrolment Application form. Please read all information on this page before proceeding with the application.**

- All Financial Assistance scholarships are needs-based and available to any students who, for financial reasons, would not otherwise be able to attend Huanui College.
- Financial Scholarships are only open to New Zealand Citizens and permanent Residents.
- The amount of the Scholarship received is at the absolute discretion of the Principal and the school's Board of Trustees. Huanui College does not offer 100% scholarships.
- It is the responsibility of the parents/caregivers to pay for any remaining school fees over and above the Tuition Scholarship.
- Supporting evidence must be supplied with the application.
- Scholarships are subject to annual review and may be withdrawn where a recipient's attitude and/or performance are unsatisfactory or the scholarship criteria are no longer being met.
- In the event that there are no Scholarship applicants who meet the candidate criteria, Huanui College receives the right not to award any scholarships at all.
- The decision of the Principal is final.
- All information supplied will be kept strictly confidential.

**A student is eligible for a Tuition Scholarship if they are enrolling at Huanui College and:**

- Their primary caregiver(s) have a combined annual gross income of \$80,000 or less (not including Working for Families tax credits); and
- Their primary caregiver(s) have a combined net worth of \$300,000 or less (not including household items e.g. kitchen appliances and furniture); and
- They, or their primary caregiver(s) are not settlors, trustees, other than in a professional or independent capacity) or beneficiaries of any trusts (exceptions will be considered on a case-by-case basis; and
- They are a New Zealand citizen or a permanent resident of New Zealand

**Before you apply for a Tuition Scholarship, please be aware that if awarded a scholarship you must consistently meet the following criteria:**

- High attendance at school and in class (90+%);
- High level of positive attitude and effort ('A' and 'B' grades);
- Adheres closely to the school vision of the College;
- Exemplifies the Huanui values;
- Maintain confidentiality if granted a Financial Assistance Scholarship. If confidence is not maintained, the scholarship is forfeit.

**To apply for the scholarship, please answer all questions in this application form, provide all required supporting documents and return to Huanui College, 328 Ngunguru Road, RD3, Whangārei 0173 before 11 September 2020.**

## STUDENT DETAILS

Full name as known on birth certificate: \_\_\_\_\_

Preferred name of student: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ ☐ Male ☐ Female

☐ Residency NZ Citizen <sup>1</sup> ☐ Permanent resident of NZ <sup>2</sup>

Other: \_\_\_\_\_

1. Attach a copy of the student's birth certificate. This does not need to be a certified copy.

2. Attach a copy of the student's birth certificate and permanent resident's visa.

## CAREGIVER DETAILS

How many primary caregivers\* does this student have? \_\_\_\_\_

*\*Primary caregivers include all step-parents, guardians and relatives who live in the student's household and act in the place of a parent and all step-parents, guardians and relatives who do not live in the student's household, but share full financial responsibility for the student. Any caregiver(s) who pays child support money for the student, but have no other financial responsibility for the student, do not need to be listed as a primary caregiver.*

### DETAILS FOR FIRST PRIMARY CAREGIVER (WHO WILL MAKE THE DECLARATION)

Full name: \_\_\_\_\_

Relationship to the student: \_\_\_\_\_

Home address: \_\_\_\_\_

Phone numbers: Home: \_\_\_\_\_ Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email address: \_\_\_\_\_

### DETAILS FOR SECOND PRIMARY CAREGIVER (IF APPLICABLE)

Full name: \_\_\_\_\_

Relationship to the student: \_\_\_\_\_

Home address: \_\_\_\_\_

Phone numbers: Home: \_\_\_\_\_ Work: \_\_\_\_\_ Mobile: \_\_\_\_\_

Email address: \_\_\_\_\_

**FAMILY INCOME** \$ \_\_\_\_\_

## EMPLOYMENT

*Please indicate employment status of each primary caregiver<sup>3</sup>.*

**FIRST PRIMARY CAREGIVER:**

☐ Employed

☐ Unemployed

☐ Other

If employed, please state name of employer: \_\_\_\_\_

If other, please provide details and attach latest financial statements: \_\_\_\_\_

**SECONDARY PRIMARY CAREGIVER:**

☐ Employed

☐ Unemployed

☐ Other

If employed, please state name of employer: \_\_\_\_\_

If other, please provide details and attach latest financial statements: \_\_\_\_\_

*3. Attach a summary of earnings from the IRD or an income assessment from Work and Income for each caregiver.*

## ADDITIONAL INCOME

Does anyone other than the student's primary caregivers provide financial assistance for this student?

☐ Yes - Please provide details below

☐ No

Full name: \_\_\_\_\_

Occupation: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Please explain type of financial assistance e.g. Child support: \_\_\_\_\_

How much financial assistance is provided each week? \$ \_\_\_\_\_

Was there any other additional income received by the student's primary caregivers during the last financial year that has not been mentioned above?

☐ Yes<sup>4</sup>

☐ No

If yes, please list each source of income and the total amount received.

Source of income: \_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

*4. Attach documentation to verify additional income e.g. Scholarships, grants awarded.*

**FAMILY NET WORTH (IN NZ DOLLARS) \$** \_\_\_\_\_

Do you own any property? ☐ Yes ☐ No

Please note if you share ownership of a property, the **FULL** value of the property must be declared below unless you have legal verification that shows proportionate ownership.

Please indicate how many properties you own. \* Number of Properties: \_\_\_\_\_

Please explain what each property is used for.

Property #1: \_\_\_\_\_

Property #2: \_\_\_\_\_

*\* Add extra properties on a separate sheet.*

Do you rent the property you live in? ☐ Yes<sup>5</sup> ☐ No

If you don't own or rent the property you live in, please explain the circumstances: \_\_\_\_\_

*5. Attach a copy of your tenancy agreement or letter from your landlord confirming your tenancy or rates notice if you own the property.*

- Please add the dollar value of all specified assets and debt you may have in the table following.*
- Please fill in every box and write '0' (zero) if the value is nil.*
- You must provide verification of all property (QV/R statements), all debt e.g. mortgage statements, current Quotable Value or Council Rating Value, credit card statements, etc.*
- Balances will not be accepted without verification.*
- You do not need to provide verification of assets other than property.*

ASSETS	VALUE	LIABILITIES	VALUE
Cash, including term deposits and funds held in savings accounts		Total amount owing on any mortgage(s)	
Total value of all property owned as per attached verification documents		Total amount owing on cars, boats and any recreational vehicles	
Total value of any business interests		Total amount owing on student loans	
Total resale value of cars, boats and any recreational vehicles		Amount owing on store cards / hire purchase	
Total value of investments		Amount owing on credit cards	

**TOTAL ASSETS:**

**TOTAL LIABILITIES:**

## TRUSTS

Is the student and/or primary caregivers settlors, trustees (other than in a professional capacity) or beneficiaries of any trusts?

☐ Yes

☐ No

The Total value of any asset in the trust(s) <sup>6</sup> \$ \_\_\_\_\_

The total income received from the trust during the last financial year <sup>7</sup> \$ \_\_\_\_\_

6. Attach a Quotable Valuation (QV) or a Council Rating Value (RV) if these assets are property.

7. Attach a copy of the trust deed for the trust and complete the Family Income and Family Net Worth sections, referencing any income or assets of the trust.

## REFEREES

Please provide contact details for two referees for the student. The first one may be a selected referee, such as a non-related friend. The second one must be a recent teacher (or another selected referee, if the student is home-schooled).

### FIRST REFEREE CONTACT DETAILS

Name: \_\_\_\_\_

Relationship to the student: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Email address: \_\_\_\_\_

### SECOND REFEREE CONTACT DETAILS

Name: \_\_\_\_\_

Relationship to the student: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Email address: \_\_\_\_\_

## DECLARATION

I, \_\_\_\_\_  
*Full name of primary caregiver*

of, \_\_\_\_\_  
*Home address*

Declare that the information I have provided in this application is true and correct.

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

### **Providing false information will result in the termination of the scholarship.**

Please attach the relevant supporting documentation:

- ☐ *The student's birth certificate or Passport*
- ☐ *Summary of earnings from the IRD or an income assessment from Work and Income for each caregiver.*
- ☐ *Documentation to verify additional income e.g. Scholarships, grants awarded.*
- ☐ *A copy of your tenancy agreement or letter from your landlord confirming your tenancy or rates notice if you own the property.*
- ☐ *A Quotable Valuation (QV) or a Council Rating Value (RV) if these assets are property.*
- ☐ *A copy of the trust deed for the trust and complete the Family Income and Family New Worth sections, referencing any income or assets of the trust.*