

UNIVERSITY OF OTAGO

2019 ENTRANCE SCHOLARSHIP INCOME AND ASSET DECLARATION FORM



Applicants for University of Otago Alumni, Donna-Rose McKay and R & E Seelye Trust Entrance Scholarships must complete this form. In addition, relevant parents, guardians and/or the partner of the applicant may also need to complete sections of this form. The Trust Declaration section will also be required for any trust to which the applicant or their relevant parents, guardians and/or spouse are a party (settlor or beneficiary).

Note that all information from this form will be securely stored and securely destroyed within an appropriate time period.

Information collected will only be viewed by those involved in the administration of the scholarship for which you have applied and in the scholarship decision-making process. Personal information collected is covered by the principles outlined in the Privacy Act 1993.

If you have any questions about completing this form, please email entrance.scholarships@otago.ac.nz

SECTION A – APPLICANT DETAILS

1. First Name

2. Surname

3. Date of Birth

<input type="text"/>	<input type="text"/>	<input type="text"/>
Day	Month	Year

4. Please indicate:

- I will be under 24 years of age on the 1st of January
 I will be 24 years or older on the 1st of January (please go to question 9)

5. Please indicate:

- Both my parents are alive
 One parent is deceased
 Both parents are deceased

6. If you are estranged from one or both of your parents, and wish to be considered independent of them, or if one or both of your (living) parents are not in a position to provide a financial declaration as part of this process, please indicate:

- Not estranged
 Estranged from Mother (or Mother's circumstances do not permit income and asset declaration)
 Estranged from Father (or Father's circumstances do not permit income and asset declaration)

Note: if estranged from both parents, please indicate your guardian and/or main source of financial support and their partner (if applicable) in question 7. If no such support exists, please provide an explanation (see overleaf).

If you wish to be considered independently of one or more of your parents please provide an explanation in the space below; if more space is required, please attach a statement. Please note: any statement made will be kept confidential and secure and will only be used for the purposes of assessing your application for the scholarship(s) for which you are applying.

Please provide details of a referee who can comment on the above statement (this may be a medical professional, lawyer, counsellor etc). Note that the same referee may be used for different scholarships.

Referee name

Role/Occupation

Email

Telephone number

Note: the University reserves the right to remove your application from consideration, if:

- (1) details provided cannot, after reasonable efforts, be confirmed; or
- (2) details provided, or further confirmation sought, suggests that you are not estranged from your parents in a manner which would prevent them from providing you with financial support.

7. If you will be under 24 years of age on the 1st of January next year, please list:

- Your living parent(s) from whom you are not estranged and who are in a position to provide an income and asset declaration (if you are adopted, please list your adoptive parents) OR
- Your guardian(s) AND
- If applicable, the partner(s) of your parent(s) or guardian(s) – defined as the married partner or as someone who lived with a parent or guardian for two years or more.

If you have no parent or guardian who provides financial support to you, you do not need to list anybody, but please explain in question 6 above.

Name	Relationship

Each person listed will need to complete Section D of this form.

8. Please note the number of siblings you have (brothers or sisters) aged 24 or younger:

- Full siblings (children of both your parents)
- Half siblings (children of one of your parents only)
- Step siblings (children of a step mother or step father)
- Children of your guardian (if applicable).

9. Are you married or have you been living with a partner for two years or more?

- Yes
 No

Name:

If yes, your partner/spouse will need to complete Section D of this form.

10. If you have children under 24 years of age, please note the number below:

- Children for whom you are the natural parent (children by blood):
 Step children (children of your partner with a different natural parent to yourself):
 Children not already counted above, for whom you are the legal guardian:

11. Are you, or any of the people listed in questions 7 or 9 (your parents, step parents, guardians or partner) a settlor or beneficiary of a trust?

- Yes
 No

If yes, Section E of this form will need to be completed for each trust for which a listed person is a settler or beneficiary.

12. Are you able to live in a parent's or guardian's home while studying at the University of Otago?

- Yes
 No

SECTION B – INCOME AND ASSET DETAILS

1. What is your current before tax weekly income (taxable income only, include any taxable benefits)?

Source	Taxable Income
TOTAL (add columns)	\$

A

2. Do you receive regular non-taxable amounts (include any non-taxed benefits)?

Source	Frequency	Amount
TOTAL (add columns)		\$

3. Please list all assets you own which were valued at \$1000 or more at the time of purchase. Include any items on which you owe debt or have not yet paid off the full amount of the purchase e.g. hire purchase goods. Provide total amounts in the bottom row (i.e. add up the total for each column).

Item	Year of Purchase	Full Purchase Price*	Amount Still Owed (if applicable)
TOTAL (add columns)		\$	\$

B

*The full purchase price is the total price of the item, not an initial down payment amount. For example, if you purchased a \$1000 stereo on HP, but thus far have only paid a down payment of \$100, record \$1000 in this column, and \$900 in the “Amount still owed” column. If you have liabilities that do not relate to a specific asset, please show them on a separate line as an Amount Still Owed.

4. Have you received any gifts over \$1,000 in total in the last 12 months?

Source	Amount
TOTAL (add columns)	\$

C

5. Have you made any gifts over \$1,000 in total in the last 12 months?

Recipient	Amount
TOTAL (add columns)	\$

SECTION D – INCOME AND ASSET DETAILS FOR PARENTS, GUARDIANS OR PARTNER

All relations of the applicant (listed in question 7 of Section A) and/or the partner of the applicant (if provided in question 9 of Section A) need to complete and sign this section. Please print as many copies of this page as needed (one page per person). If two (or more) people completing this section share assets and income, do not list these multiple times, but rather list them under one of the people only.

1. First name (of person completing this section)
2. Surname (of person completing this section)
3. Relationship to applicant
4. Occupation

5. What is your current before tax weekly income (taxable income only, include any taxable benefits)?

Source	Taxable Income
TOTAL (add columns)	\$ <input style="width: 150px;" type="text"/>

6. Do you receive regular non-taxable amounts (include any non-taxed benefits)?

Source	Frequency	Amount
TOTAL (add columns)		\$ <input style="width: 100px;" type="text"/>

7. Please list all assets you own which were valued at \$1000 or more at the time of purchase. Include any items on which you owe debt or have not yet paid off the full amount of the purchase e.g. hire purchase goods. Provide total amounts in the bottom row (i.e. add up the total for each column).

Item	Year of Purchase	Full Purchase Price*	Amount Still Owed (if applicable)
TOTAL (add columns)		\$ <input style="width: 150px;" type="text"/>	\$ <input style="width: 150px;" type="text"/>

*The full purchase price is the total price of the item, not an initial down payment amount. For example, if you purchased a \$1000 stereo on HP, but thus far have only paid a down payment of \$100, record \$1000 in this column, and \$900 in the "Amount still owed" column. If you have liabilities that do not relate to a specific asset, please show them on a separate line as an Amount Still Owed.

D

E

8. Have you received any gifts over \$1,000 in total in the last 12 months?

Source	Amount
TOTAL (add columns)	\$

9. Have you made any gifts over \$1,000 in total in the last 12 months?

Recipient	Amount
TOTAL (add columns)	\$

I declare that all information provided in this Section is true and complete. I accept that providing false or incomplete information may result in the applicant facing penalties including, but not limited to, the loss of any University of Otago Scholarship awarded.

Name

Signature

Date | | 20 |
Day Month Year

SECTION E – TRUST DECLARATION

One copy of this section needs to be provided for each Trust for which any of the following people are settlors or beneficiaries:

- (i) the applicant;
- (ii) relations of the applicant (listed in question 7 of Section A); and/or,
- (iii) the partner of the applicant (if provided in question 9 of Section A)

Please print as many copies of this section as needed (one copy per trust). Note that this declaration may be completed by any of the listed Settlers or Beneficiaries on behalf of the Trust.

1. Name of Trust

2. Name of Settlers

Please indicate with tick(s) in the box on the right which of these (if any) are the applicant, relative or a partner, as disclosed on the Asset and Income Declaration Form(s)

Name	Relevant Relative Or Partner (tick if yes)

3. Names of Trustees

Please indicate with tick(s) in the box on the right which of these (if any) are the applicant, relative or a partner, as disclosed on the Asset and Income Declaration Form(s)

Name	Relevant Relative Or Partner (tick if yes)

4. Names of Trust Beneficiaries

Please indicate with tick(s) in the box on the right which of these (if any) are the applicant, relative or a partner, as disclosed on the Asset and Income Declaration Form(s)

Name	Relevant Relative Or Partner (tick if yes)

5. Please list all assets held in the trust valued over \$5,000. Include any items on which debt is owed and who that debt is owed to. Provide total amounts in the bottom row (i.e. add up the total for each column).

Item	Year	Full Purchase Price*	Amount Still Owed	Debt Owed To
TOTAL (add columns)		\$	\$	

*The full purchase price is the total price of the item, not an initial down payment amount. For example, if the trust owns a \$250,000 house, but still owe \$150,000 on the mortgage, record \$250,000 in this column, and \$150,000 in the "Amount still owed" column. If the trust has debts that are not associated with a particular asset, please show the debt in a separate line under Amount Still Owed.

6. Have any gifts over \$5,000 been received in the last 12 months?

Source	Amount
TOTAL (add columns)	\$

7. Have any capital distributions totalling \$5,000 or more been made in the last 12 months?

Recipient	Amount
TOTAL (add columns)	\$

I declare that all information provided in this Section is true and complete. I accept that providing false or incomplete information may result in the applicant facing penalties including, but not limited to, the loss of any University of Otago Scholarship awarded.

Name

Signature

Date 20
Day Month Year

F
8

SECTION F – SUMMARY AND DECLARATION

Please enter the figures for each of the summary boxes throughout this form – if nil please enter '0'. If a tab has multiple entries, please add these together in the box below: or example, if three people completed SECTION D, you should add up the three entered figures for Tab D and the three entered figures for Tab E in Boxes D and E below. The figures calculated below will need to be entered when you apply online.

Box A	<input type="text"/>	<i>Applicant weekly income</i> – enter the figure from Tab A (Section B)
Box B	<input type="text"/>	<i>Applicant assets</i> – enter the figure from Tab B (Section B)
Box C	<input type="text"/>	<i>Applicant gifts received</i> – enter the figure from Tab C (Section B)
Box D	<input type="text"/>	<i>Combined parental/partner income</i> – sum all the figures from Tab D (Section D); note that there may be multiple entries for Tab D
Box E	<input type="text"/>	<i>Combined parental/partner assets</i> – sum all the figures from Tab E (Section D); note that there may be multiple entries for Tab E
Box F	<input type="text"/>	<i>Combined trust income</i> – sum all the figures from Tab F (Section E); note that there may be multiple entries for Tab F
Box G	<input type="text"/>	<i>Combined trust assets</i> – sum all the figures from Tab G (Section E); note that there may be multiple entries for Tab G

I hereby declare that the information provided in this declaration is true and complete. Where necessary, I have liaised with the trust beneficiaries, trustees, or accounting or legal professionals to confirm this.

I accept that if information in this form or any of the attached forms is shown to be false, the applicant or I may face penalties including the loss of any University of Otago scholarship awarded.

Name

Signature

Date 20

Day Month Year

Please upload this form as supporting documentation in pdf or jpeg format during the online entrance scholarship application.