

APPLICATION
FOR
ASSISTANCE UNDER
the
ST. JOSEPH'S COLLEGE
OLD BOYS' UNION
BURSARY SCHEME



STRICTLY CONFIDENTIAL

BACKGROUND INFORMATION ON THE OLD BOYS UNION BURSARY SCHEME:

At a meeting on 16 September, 1917 it was resolved that the "St. Joseph's College Old Boys' Bursary Fund" be established for sons of Old Boys'. The earliest reference to the granting of a bursary however, was not until 1924 when a bursary for 1925 was announced. In the 1930's the Bursary Fund experienced great difficulty, presumably due to the Great Depression and on a number of occasions there were insufficient funds to meet the commitments.

The introduction of the Wyndham Scheme in the 1960's could have spelled the end of the Bursary Fund as the whole of the College Family focused on the College Building Fund Appeal. Indeed the finances of the Bursary Fund were having difficulty with the rapid rate of inflation being experienced at the time.

Growth of the capital in the Bursary Fund was for a long time far less than might have been expected on the basis of the original aims and aspirations. However, there have been a number of significant periods in the life of the Bursary Fund which has stimulated interest and created opportunities from time to time, the St. Joseph's College Centenary in 1981 being one very prominent occasion.

With the strong support the Old Boys' Union receives from its outstanding number of Life Members, the Bursary Fund has grown in recent times to a level where some meaningful assistance can be provided, however the low investment returns available in recent times from fixed deposits has seen a decline in income earned on the capital of the Bursary Fund.

Consequently, resources are limited and consideration of applications will always be based on hardship.

**GENERAL CONDITIONS
FOR CONSIDERATION OF ASSISTANCE
UNDER THE OLD BOYS' UNION BURSARY SCHEME:**

- The candidate must be enrolled at St. Joseph's College before submitting an application for assistance under the Old Boys' Union Bursary Scheme.
- Assistance under the St. Joseph's College Old Boys' Union Bursary Scheme is only available to blood and adopted sons of Old Boys' of St. Joseph's College.
- Assistance is only provided to candidates in Years 10, 11 or 12 unless exceptional circumstances exist which warrant consideration of a candidate in Years 7, 8 or 9. No assistance is available to Extended - Day Students in Years 7, 8, 9 or 10.
- The value of assistance provided under the Old Boys' Union Bursary Scheme is determined by the Bursary Board contingent upon the financial circumstances of the parents/guardian at the time. Consideration will also be given to the relative daily living costs of a student being at home on a full time basis. Assistance provided will be **for one year** however, parents/guardians will have the opportunity to **apply for renewal** of assistance for each following year contingent upon their financial and family circumstances remaining unchanged.
- Assistance under the Old Boys' Union Bursary Scheme is available on the condition that the balance of fees is paid for each year to the College by the relevant due date. Parents/guardians who do not comply with this requirement will not be considered for renewal in the following year.
- Applicants will be required to provide comprehensive details on their financial position to support their application. A detailed list of the requirements is enclosed. This information is strictly confidential and will only be reviewed by members of the Bursary Board.
- Applicants will be required to provide their consent for the Bursary Board to review the Candidates Enrolment Application to St. Joseph's College with a view to obtaining further information on the student's school achievements to date and to confirm references etc.
- Applicants will be required to sign a Consent Form under the Privacy Protection of Information Privacy Act 1988 (Cth) authorising the Bursary Board to undertake appropriate enquiries to verify the applicant's financial position.
- Applicants may be required to be available for an interview with the Bursary Board as part of the application process.
- Applicants are required to treat the application as strictly confidential.
- Applications are processed by the Bursary Board Secretary:

Mr Bryan Sidgreaves
17 Waruda Place
HUNTLEY'S COVE NSW 2111
Home: (02) 9879 3331
Office: (02) 9648 3400
Fax: (02) 9648 4375

Please forward the completed application and supporting documentation to the above address.

CANDIDATE

Surname: _____

Christian Names: _____

Preferred Christian Name: (If Applicable) _____

Date of Birth: _____

Student's Residential Address: _____

Post Code _____

Present School: _____

Address of that School: _____

Present School Year: _____

Student's Health: _____

Does the Student have Brothers associated with the College? If so please list below whether past, current or future students (note commencement year at S.J.C and present age)

NAME/S	YEAR
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

APPLICANTS

PARENT'S DETAILS:

Father's Surname: _____

Father's Christian Names: _____

Father's Preferred Christian Name: _____

Date of Birth: _____

Place of Birth: _____

Residential Address: _____

Postal Address: _____

Post Code _____

TELEPHONE:

Father's Home Phone: () _____

Father's Home Fax: () _____

Father's Business Phone: () _____

Father's Business Fax: () _____

Father's Mobile: _____

Email Address: _____

Profession or Occupation: _____

Name of Employer: _____

Address of Employer: _____

Post Code _____

Brief Details of Employment History: _____

Years a Student at St. Joseph's College: _____ (Year) to _____ (Year)

Mother's Surname: (not maiden name) _____

Mother's Christian Names: _____

Mother's Preferred Christian Name: _____

Date of Birth: _____

Place of Birth: _____

Residential Address: _____

Post Code _____

Postal Address: _____

Post Code _____

TELEPHONE:

Mother's Home Phone: () _____

Mother's Home Fax: () _____

Mother's Business Phone: () _____

Mother's Business Fax: () _____

Mother's Mobile: _____

Email Address: _____

Profession or Occupation: _____

Name of Employer: _____

Address of Employer: _____

Post Code _____

GUARDIAN / OTHER PARENT:

Surname: _____
Christian Name: _____
Partner's Name: _____
Residential Address: _____
_____ Post Code _____
Postal Address: _____

TELEPHONE:

Home Phone: () _____
Home Fax: () _____
Business Phone: () _____
Business Fax: () _____
Mobile: _____

Documentation Required:

The following supporting documentation must be submitted with this application in order for the application to be considered by the Bursary Board:-

- Signed Consent under the "Privacy Protection of Information Privacy Act 1988 (Cth)" (See attached form).
- Signed Comprehensive Statement of Assets and Liabilities (combined or separate for each applicant, as applicable) to be completed as at the date of signing the application. This statement must reflect current market values of all assets and include the current balance of Superannuation Fund entitlements. (See attached example form)
- Copy of Group Certificates for both applicants for the last two (2) financial years.
- Copy of Income Tax Returns for both applicants for the last two (2) financial years.
- Copy of Income Tax Assessments for both applicants for the last two (2) financial years
- Details of employment related benefits for both applicants (for example accommodation and motor vehicles allowances etc).
- If operating within a Company or Trust Structure copy of Financial Accounts and Income Tax Returns for the last two (2) years with a detailed explanation of ownership of shares and entitlement to distributions. A copy of the dividend franking account if applicable would also be required.
- Advice on full details of current and anticipated future Centrelink entitlements.
- Details of any entitlements that the applicants may receive from any Trust Funds that have been set up either by way of a Will or Superannuation Fund providing details of any amount that is paid to the beneficiary/s of the trust each year.

To: St. Joseph's College Old Boys' Union

Privacy Protection of Information Privacy Act 1988 (Cth)

Authority for St. Joseph's College Old Boys' Union to obtain credit information.

To enable St. Joseph's College Old Boys' Union to assess my/our application for assistance under the St. Joseph's College Old Boys' Union Bursary Scheme. I/we authorise St. Joseph's College Old Boys' Union:

- To obtain from a credit reporting agency a credit report containing personal information about me/us in relation to assistance to be provided by St. Joseph's College Old Boys' Union.

Authority to exchange information with other credit providers.

In accordance with Section 18N(1)(b) of the Privacy Act, I/we authorise St. Joseph's College Old Boys' Union to give to and obtain from credit providers named in this application information about my/our credit arrangements. I/we understand that information can include any information about my/our credit worthiness, credit standing, credit history or credit capacity that credit providers are allowed to give or receive from each other under the Privacy Act 1988.

I/we understand the information may be used for the following purposes:-

- To assess an application by me/us for assistance.
- To assess my/our credit worthiness.

Bank opinions.

I/we authorise St. Joseph's College Old Boys' Union to receive a banker's opinion for purposes connected with my/our business, trade or profession.

Authority for St. Joseph's College Old Boys' Union to obtain information.

I/we authorise St. Joseph's College Old Boys' Union to obtain personal information in relation to my/our employment, income (including taxable income), property, tenancy arrangements and my/our liabilities from any person named in my/our application for assistance under the St. Joseph's College Old Boys' Union Bursary Scheme or from any person whose name has otherwise been provided to St. Joseph's College Old Boys' Union.

APPLICANT/S:

SIGNATURE / DATE

STATEMENT OF ASSETS & LIABILITIES

APPLICANTS: _____

ASSETS

Land & buildings @ market value

Shares in listed companies/trusts at market value

Shares in private companies/unlisted trusts at market value
(attach a copy of latest valuation)

Net equity in any partnership venture

Trade debtors

Goodwill

Plant, motor vehicles and office equipment
At clearing sale value

Livestock at market value
(attach a detailed breakdown)

Wool on hand (in store or on farm)

Valuation of standing crops, grain etc (in store or on farm)

Cash on deposit

Term deposits/bank balances

Farm management deposits \$ _____

LIABILITIES

Hire purchase mortgages and other borrowings
Employee entitlements (provision for annual, sick and long service leave)

Taxation commitments

Trade creditors \$ _____

NETT ASSETS AT MARKET VALUE **\$ _____**

Superannuation fund balances - obtained from
advice from superannuation fund

Notes

- (a) Assets include domestic and international investments
- (b) Shares/units would include farmers investment in Woolstock Australia Limited and Australian Wheat Board

Checklist of Items to consider when preparing a Statement of Assets and Liabilities

ASSETS

1. Details of property assets including current market value.
2. Details of domestic and international share investments.
3. Details of domestic and international managed investments.
4. Attached a copy of the latest valuation of any investments the applicant has in private companies/family trusts. Valuation must value assets at current market value not historical cost.
5. Details on any equity in partnership ventures at market value.
6. If in business, a market valuation of goodwill.
7. Trade debtors.
8. Plant, motor vehicles, office equipment and furniture at clearing sale values.
9. Structural improvements to property assets if not included in 1 above.
10. Livestock at market value. Please provide a detailed list of type of stock and unit value.
11. Wool/cotton on hand (including wool that is either in store or on farm from sheep that have been shorn which have not been sold).
12. In valuing grain on hand, include an estimated value of the value of standing crops (this will depend on the time of year the application is being completed), along with any grain that is in store or has been sold.
13. In relation to cash balances, including any of the following;
 - Term deposits
 - Cash management accounts
 - Farm management deposits (previously known as “Farm Management Bonds)

- Loans including interest free loans

14. Attach a list of the latest valuation for any horticulture or vindiculture crops that are grown on your country.

LIABILITIES

1. Details of loan commitments including all borrowings.
2. Any hire purchase mortgages or equipment leases.
3. Employee entitlements including provision for long service leave, annual and sick leave.
4. Trade creditors.
5. Personal and company income tax commitments.

SUPERANNUATION FUNDS

1. Details of the money at the end of the previous financial year standing to the credit of the applicant's account in superannuation funds.