**2024 Melbourne Montessori School Scholarship Application**

**FINANCIAL STATEMENT**

Melbourne Montessori School (MMS) and the MMS Foundation are committed to providing opportunities for students who would otherwise not have access to an independent Montessori education. The MMS Scholarship program offers scholarships, all means-tested, to support current and prospective students and reflects our commitment to an inclusive and diverse community.

The following Melbourne Montessori Schools Scholarships are available in 2024:

1. **MMS Bursaries** are available for students whose families are facing financial hardship and require fee relief to continue attending school.
2. The **MMS Montessorian Scholarship** is awarded to a prospective student entering our Senior School Years 7 to 11.
3. The **MMS Senior School Scholarship** is a full-fee scholarship awarded to an MMS Junior School student who is unable to continue their education at the MMS Senior School. This scholarship is awarded in honour of long-serving Principal, Gay Wales.

The information collected from you in this form is for the purpose of assessing your family’s financial situation and it will be used for this sole purpose. It is your obligation to provide all information that will provide a full and accurate indication of your financial situation whether expressly asked in this form or not.

Please ensure that you complete this Financial Statement and submit it with your 2024 MMS Scholarship Application as part of your submission for consideration.

**STUDENT DETAILS**

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate Name: |  |  |  |
| Home Address: |  |  |  |
| Date of Birth: |  | Current School: |  |
| Entry Level: |  | Entry Year: |  |

Please indicate all persons for whom financial information is included on this form:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Parent / Guardian 1 |  | Parent / Guardian 2 |

Other (please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please indicate all persons with whom the candidate lives:

**PARENT / GUARDIAN DETAILS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Parent / Guardian 1** | |  | **Parent / Guardian 2** | |
| Name: |  |  | Name: |  |
| Relationship to candidate: |  |  | Relationship to candidate: |  |
| Residential Address: |  |  | Residential Address: |  |
| Mobile: |  |  | Mobile: |  |
| Email: |  |  | Email: |  |
| Occupation: |  |  | Occupation: |  |
| Employer: |  |  | Employer: |  |
| Years with Employer: |  |  | Years with Employer: |  |

Please list details of each full-time course or study the student is enrolled in time of application:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Student Name | School | Level | Tuition Fees | Amount Paid by other sources |
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**FINANCIAL DETAILS – INCOME**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Parent/Guardian 1** | | | |  | **Parent/Guardian 2** | | | |
|  | 2019/20 | 2020/21 | 2021/22 |  |  | 2019/20 | 2020/21 | 2021/22 |
| Gross PAYG income |  |  |  |  | Gross PAYG income |  |  |  |
| Dividend/interest income |  |  |  |  | Dividend/interest income |  |  |  |
| Net profit/loss) from business |  |  |  |  | Net profit/loss) from business |  |  |  |
| Maintenance payments |  |  |  |  | Maintenance payments |  |  |  |
| Allowances |  |  |  |  | Allowances |  |  |  |
| Superannuation |  |  |  |  | Superannuation |  |  |  |
| Pension Payments |  |  |  |  | Pension Payments |  |  |  |
| Other Income |  |  |  |  | Other Income |  |  |  |
| **TOTAL INCOME** |  |  |  |  | **TOTAL INCOME** |  |  |  |

**FINANCIAL DETAILS - EXPENSES**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Parent/Guardian 1** | | | |  | **Parent/Guardian 2** | | | |
|  | 2019/20 | 2020/21 | 2021/22 |  |  | 2019/20 | 2020/21 | 2021/22 |
| Income Tax |  |  |  |  | Income Tax |  |  |  |
| Rent / Mortgage |  |  |  |  | Rent / Mortgage |  |  |  |
| School Expenses |  |  |  |  | School Expenses |  |  |  |
| Health Insurance |  |  |  |  | Health Insurance |  |  |  |
| Life Insurance |  |  |  |  | Life Insurance |  |  |  |
| House & Contents Insurance |  |  |  |  | House & Contents Insurance |  |  |  |
| Motor Vehicle Expenses |  |  |  |  | Motor Vehicle Expenses |  |  |  |
| Telephone & Utilities |  |  |  |  | Telephone & Utilities |  |  |  |
| Credit Card(s) |  |  |  |  | Credit Card(s) |  |  |  |
| Club Fees / Lessons |  |  |  |  | Club Fees / Lessons |  |  |  |
| Holidays |  |  |  |  | Holidays |  |  |  |
| Other Expenses |  |  |  |  | Other Expenses |  |  |  |
| **TOTAL EXPENSES** |  |  |  |  | **TOTAL EXPENSES** |  |  |  |
| **INCOME MINUS EXPENSES** |  |  |  |  | **INCOME MINUS EXPENSES** |  |  |  |

**FINANCIAL DETAILS – CURRENT ASSETS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Parent / Guardian 1** | |  | **Parent / Guardian 2** | |
| Please note: Assets/liabilities may be listed under parent/guardian 1 if jointly owned with parent/guardian 2. | | | | |
| **Home** | |  | **Home** | |
| Year Purchased |  |  | Year Purchased |  |
| 1. Purchase Price |  |  | Purchase Price |  |
| 1. Unpaid Mortgage |  |  | Unpaid Mortgage |  |
| Equity (a) less (b) |  |  | Equity (a) less (b) |  |
| Current Market Value |  |  | Current Market Value |  |
| **Other Assets** | |  | **Other Assets** | |
|  | Current Value |  |  | Current Value |
| Net Business Assets |  |  | Net Business Assets |  |
| Bank Accounts |  |  | Bank Accounts |  |
| Other Investments |  |  | Other Investments |  |
| Family Trusts |  |  | Family Trusts |  |
| **Motor Vehicle** | |  | **Motor Vehicle** | |
| Market Value | Year / Make |  | Market Value | Year / Make |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
| **Recreational Vehicles (i.e. boats)** | |  | **Recreational Vehicles (i.e. boats)** | |
| Market Value | Year / Make |  | Market Value | Year / Make |
|  |  |  |  |  |
|  |  |  |  |  |

**FINANCIAL DETAILS – CURRENT LIABILITIES (PER MONTH)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Parent/Guardian 1** | |  | **Parent/Guardian 2** | |
| Please note: Assets/liabilities may be listed under parent/guardian 1 if jointly owned with parent/guardian 2. | | | | |
| Bank loans |  |  | Bank loans |  |
| Mortgages |  |  | Mortgages |  |
| Personal loans |  |  | Personal loans |  |
| Other loans |  |  | Other loans |  |
| Credit cards |  |  | Credit cards |  |
| Leases |  |  | Leases |  |
| Other debt (please give details) |  |  | Other debt (please give details) |  |

Do you expect a significant change in either Parent / Guardian income in the next 12 months? If yes, please explain:

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Please tell us about your financial situation over the past three years.

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**DECLARATION**By submitting this Financial Statement, I/we declare that the information provided by me/us is true, correct, and complete in every particular to the best of my/our knowledge and that such information is submitted in support of this application without reservation. I/we undertake that if my/our financial circumstances change materially during the term of any scholarship awarded that I/we will inform the Principal of Melbourne Montessori School.

**SIGNATURES**

|  |  |  |  |
| --- | --- | --- | --- |
| Parent/Guardian 1 Name: |  | | |
| Signature: |  | Date: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Parent/Guardian 2 Name: |  | | |
| Signature: |  | Date: |  |