

## **GUIDANCE NOTES FOR COMPLETION** **THE FINANCIAL ASSISTANCE SCHEME APPLICATION FORM**

### **ELIGIBILITY CRITERIA**

According to Financial Assistance Scheme policy, families of applicants have to have had encountered “**sudden and unexpected**” change of circumstances during the period of 12 months immediately prior to date of application in order to qualify for hardship allowance assessment.

For applicants who were already approved for Financial Assistance Scheme in prior year, the “sudden and unexpected” change of circumstances during the period of 12 months immediately prior to the date of application may not be the sole criteria for consideration. Each case will be reviewed individually based on the supporting documents provided.

### **STATEMENT OF INCOME**

Please state the following under income declaration:

- Annual salaries / wages, business profit, any other earned income received in the year (for 2009/10, the relevant income should refer to 1 April 2008 – 31 March 2009). The annual income for the period should also include bonus, commissions, tips and any allowance received. All latest income information of the applicant, which can help ESF make an informed decision, would be welcomed.
- Remittances and contributions received from family members, relatives or friends.
- Annual rent received in the past financial year from letting of any houses, flats, shops or land owned by any member of the family (in Hong Kong or overseas). This should also include any subletting of house/flat occupied by the family. Details of which should be given in the ASSETS Section.

### **ASSETS & LIABILITIES**

Please give full details of all assets held at current market value, owned or partly owned by each member of the family during the period of 12 months immediately prior to date of application. This should include all land and properties, stocks and shares, vehicle(s), monies including foreign currencies deposited in bank(s) and/or other financial institutions, company, firm or with individual person, and finally any cash on hand. All liabilities incurred by the family (including all local and / or overseas personal loans, mortgages, credit card balances, etc).

### **HOUSING**

Please give full details of accommodation occupied by the family. Do not include management fees, electricity, gas or water charges. *If housing is rented, one copy of the current rental agreement in respect of your housing should be attached to the form, failure to do so may result in the exclusion of housing expenditure incurred by you.*

## **MEDICAL COST**

Medical expenses for any member of family, who is permanently incapacitated or chronically sick, may be allowed for deduction. Please give details. A social welfare or a medical certificate should be attached. It should state the nature of the incapacity or sickness and confirm that the costs declared are reasonable.

## **ADDITIONAL INFORMATION BY APPLICANT**

If there has been a considerable change in circumstances, information as detailed above should still be supplied. In addition, documentary evidence of new circumstances must also be included. This may be photocopy of notification of redundancy or cancellation of a contract, a statement of new income, copy of pay advice etc.

## **DOCUMENTS TO BE SUBMITTED WITH THE APPLICATION**

The following documents should be attached to this application:

- (a) Documentary evidence in respect of the earned income of **every member** of the family which include:
- (i) Photocopies of **latest** Salaries Tax demand note from Inland Revenue Department
  - (ii) Photocopies of **latest** salary statement or contract

In addition, for self-employed workers, it will be necessary for them to provide in writing details of income earned with supporting evidence during the relevant period, which include:

- (iii) Photocopies of **latest** Profit Tax demand note from Inland Revenue Department
  - (iv) Photocopies of Audited Profit and Loss account and Balance Sheet
- (b) Photocopies of **last three months'** bank statements / passbook records in respect of all current / savings / fixed deposit accounts held by yourself and family members. The photocopy of the first page of each passbook showing the name(s) of the account holder(s) should be included.
- (c) Photocopies of rental agreement, receipt for rent received (including sub-letting) or rent paid, rates or mortgage repayment of the property / properties or dwelling place.
- (d) A social welfare or medical certificate in respect of the Medical Cost Section.

- Notes:*
- (i) *Applicants should be the parents or the legal guardian of the student(s).*
  - (ii) *Applicants are required to complete in full all the details requested in the application form. Otherwise, the application may not be considered.*
  - (iii) *Failure to produce documentation without good reason may lead to rejection of application.*
  - (iv) *Applications and documents submitted are not returnable.*
  - (v) *The information provided will be used for the purpose of processing your application for Financial Assistance Scheme.*
  - (vi) *After the application has been processed, the data will be retained for future administration. The data held by us will be kept **confidential** and is only accessible to the School Fees Department.*
  - (vii) *You have the right to obtain access to and to request correction of any personal information on you held by the ESF. Requests for such access should be in writing and made to the Manager, School Fees Section.*
  - (viii) *In normal circumstances, applications should be submitted at the beginning of the school year or during the school year but no later than 30 April 2010.*

## APPLICATION FOR 2009 / 2010

### FINANCIAL ASSISTANCE SCHEME

**PLEASE READ THESE NOTES CAREFULLY BEFORE COMPLETING THE FORM.**

- (a) Only one form is required per family.
- (b) Completed forms, with all supporting documents, should be returned to:  
**The English Schools Foundation, G.P.O. 11284, Hong Kong**
- (c) The information supplied by the applicant in his/her application will form the basis of determining the appropriate level of financial assistance (if any) to be awarded. It should be noted that it is an offence to obtain property/pecuniary advantage by deception. Any person who does so commits an offence and is liable on conviction to imprisonment for 10 years under the Theft Ordinance, Chapter 210.
- (d) Applicant and his/her family members are requested to co-operate with ESF staff in the course of the authentication. Intentional obstruction to our staff or concealment of information may lead to full recovery of financial assistance already granted and / or rejection of future applications.
- (e) The Applicant is responsible for duly contacting the ESF School Fees Section should his/her family circumstances change such that financial assistance may be affected.

**PERSONAL DATA**

<p>Name of Applicant: _____</p> <p>Residential Address: _____          _____          _____</p> <p>Marital Status: _____</p> <p>Home Tel: _____</p> <p>Mobile/Pager: _____</p> <p>Passport/HKID No: _____</p> <p>If passport, issued by: _____</p> <p>Place of Issue: _____</p>	<p>Applicant Occupation: _____</p> <p>Employer &amp; Address: _____          _____          _____</p> <p>Office Telephone: _____</p> <p>Spouse Name: _____</p> <p>Spouse Occupation: _____</p> <p>Passport/HKID No: _____</p> <p>If passport issued by: _____</p> <p>Place of Issue: _____</p>
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**Particulars of children attending Discovery College**

Name of Child	Date of Birth	Form	Student Number

**Particulars of OTHER children below age 18.**

Name of Child	Date of Birth	School Attended

Has a Financial Assistance Scheme been granted in a previous year?

YES / NO

**STATEMENT OF INCOME****APPLICANT****SPOUSE****A. Income not liable to Hong Kong tax**  
(Attach schedule, detailing sources)

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

**B. Income liable to Hong Kong Profit tax**  
(Attach tax assessment and accounts)

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

**C. Income liable to Hong Kong Salaries Tax**  
Gross salary for the year 2008/2009HK\$ \_\_\_\_\_  
(Current salary: \_\_\_\_\_ p.m.)HK\$ \_\_\_\_\_  
(Current Salary: \_\_\_\_\_ p.m.)

Commissions / Bonus for the year 2008/2009

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Gratuities/Tips

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Education allowance

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Housing allowance

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Travelling allowance

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Pension

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Remittance and Contribution from Family or  
Other Organization

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Rent Received Locally or from Other Countries

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

Other Income (please specify)

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

**D. Housing**

RENT paid by EMPLOYER

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

RENT paid by APPLICANT

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

MORTGAGE paid by APPLICANT

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

FULLY owned by APPLICANT

HK\$ \_\_\_\_\_

HK\$ \_\_\_\_\_

**EMPLOYERS' CERTIFICATE**I hereby confirm that the person named above is  
employed by me / us and that the gross income and  
allowances for the year have been fully and  
correctly disclosed.\_\_\_\_\_  
Name/Title of the  
authorized signature\_\_\_\_\_  
Name/Title of the  
authorized signature\_\_\_\_\_  
(Co. name & chop)\_\_\_\_\_  
(Co. name & chop)**APPLICANTS' DECLARATION**I declare that the particulars given and the income  
declaration are complete, true, and correct in  
every detail.\_\_\_\_\_  
(Name in CAPITALS)\_\_\_\_\_  
(Name in CAPITALS)\_\_\_\_\_  
(Signature)\_\_\_\_\_  
(Signature)

## **ASSETS & LIABILITIES**

Capital Item	Detailed Description	Estimated Value	Self-occupied / Rent-out / Vacant	Annual Derived Income
Land and Properties (including House / Flat / Land / Car Park etc.)	(Location and size) _____ _____	_____ _____	_____ _____	_____ _____ _____
Stocks and Shares	(Name and quantity) _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Vehicle (e.g. private car, taxi, etc.)	_____ _____	_____ _____	_____ _____	_____ _____
Miscellaneous (including Cash on Hand, Paper Gold, Loan to others, etc.)	_____ _____ _____	_____ _____ _____	_____ _____ _____	_____ _____ _____
Bank / Finance Co. Deposits (including Local & Foreign currency Savings, Current & Time deposits, Trust funds, Credit Cards, etc.)	(Name of Bank / Financial Co.) _____ _____	_____ _____	_____ _____	_____ _____ _____
Liabilities (including Loans, Overdraft and Mortgages, Credit Cards, etc.)	(Name of creditor and nature) _____ _____	Amount Outstanding _____ _____	_____ _____	Annual Repayment _____ _____ _____

**\* Note: Please do not make omissions. Use a separate sheet if necessary.**

