

# JAMES PEEK TRUST

## Annual Statement of Means by Beneficiary

Applicant's Name

Year ending on the .....of.....20

1 Total income from all sources, but excluding grant from James Peek Trust, Old Age Pension (*see 3 below*), and contributions by children (*see 8 below*).  
Full details are necessary, and if you have a husband or wife living, you should include his or her income.  
All income returned for Tax purposes should be included, together with any family gifts (*see footnote E*).

2 Have you applied for Old Age Pension?

3 If Old Age Pension received, please state amount.  
(*See footnote A*)

4 If application refused or granted at a reduced rate, please state reason. (*See footnotes A & B*)

5 Amount of Rent paid. (*See footnote C*)

6 Number and ages of children, if any, stating which are now supported by you. (*See footnote D*)

7 Total amount spent on support, education and clothing of children during the year.

8 If any children now have independent incomes please state amount (if any) contributed by them towards your expenses during the year.

A *These particulars should be given also for any husband or wife now living.*

B *Insert YES or NO or NOT ELIGIBLE. If NO state reason.*

C *If you are a freeholder, or have free lodging, state this.  
If rent paid includes food, give full amount paid, but add note,  
INCLUDES MEALS.*

D *If no children, insert NO CHILDREN. If children are self-supporting, state this.*

E ***Beneficiaries must make sure that they have claimed all tax relief to which they may be entitled.***

Signed .....

Date .....