

## FINANCIAL AID APPLICATION Academic School Year 2010-2011

### Part 1 – APPLICANT AND FAMILY INFORMATION

#### STUDENT APPLICANT(S) INFORMATION

##### Student #1

<b>1A</b>	Last Name	First Name	MI
	Date of Birth	Sex <input type="checkbox"/> M <input type="checkbox"/> F	<b>2A</b> Grade student will be entering in September 2010:
<b>3A</b>	Indicate the relationship of the parent listed in question 6A to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>4A</b>	Indicate the relationship of the parent listed in question 6B to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>5A</b>	Student lives with (check all that apply) <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		

##### Student #2

<b>1B</b>	Last Name	First Name	MI
	Date of Birth	Sex <input type="checkbox"/> M <input type="checkbox"/> F	<b>2B</b> Grade student will be entering in September 2010:
<b>3B</b>	Indicate the relationship of the parent listed in question 6A to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>4B</b>	Indicate the relationship of the parent listed in question 6B to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>5B</b>	Student lives with (check all that apply) <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		

##### Student #3

<b>1C</b>	Last Name	First Name	MI
	Date of Birth	Sex <input type="checkbox"/> M <input type="checkbox"/> F	<b>2C</b> Grade student will be entering in September 2010:
<b>3C</b>	Indicate the relationship of the parent listed in question 6A to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>4C</b>	Indicate the relationship of the parent listed in question 6B to this student <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		
<b>5C</b>	Student lives with (check all that apply) <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Male Guardian <input type="checkbox"/> Female Guardian		

#### PARENT OR GUARDIAN INFORMATION

<b>6A Full Name of Father:</b>	<b>6B Full Name of Mother:</b>
Address:	Address:
Occupation:	Occupation:
Employer:	Employer:
Employer Address:	Employer Address:
<b>7A</b> Address to which all correspondence will be mailed:	
<b>7B</b> Parishioner of St. Martin's in-the-Field Church? yes <input type="checkbox"/> no <input type="checkbox"/>	Home Parish: Religion:

### Part 2 – PARENTS' INCOME AND EXPENSE INFORMATION

- 8A.** This application is to be submitted with your 2009 tax return, W-2 and supporting information.
- 8B.** Income tax filing status for 2009:  
 Single  Married, joint return  Married, filing separately  Head of household  Do not file
- 8C.** Did the student applicant file a federal tax return for 2009? Student A \_\_\_\_\_ Student B \_\_\_\_\_ Student C \_\_\_\_\_
- 8D.** How many federal income tax exemptions did you or will you claim for 2009? \_\_\_\_\_
- 8E.** How many children, including the student applicant(s), are receiving support from you in 2010? \_\_\_\_\_
- 8F.** How many children entered in question 8E will be attending full-time child care, tuition-charging preschools, schools, or colleges in 2010-2011? \_\_\_\_\_

	2009	Estimated 2010
<b>TAXABLE INCOME BEFORE DEDUCTIONS</b>		
<b>9A</b>	Salaries and wages for parent stepparent, or guardian 6A	
<b>9B</b>	Salaries and wages for parent, stepparent or guardian in 6B	
<b>9C</b>	Taxable dividends and/or interest income from 1099 statement(s)	
<b>9D</b>	Alimony received or estimated (do not include child support)	
<b>9E</b>	Net profit/loss from business and/or farm (if loss use parenthesis around figures) Circle one: a) parent from 6a b) parent from 6B c) both	
<b>9F</b>	Other taxable income (see instructions)	
<b>10A</b>	Untaxed portion of payments to IRA	
<b>10B</b>	Keogh plan payments and self-employed SEP retirement plan	
<b>11</b>	Other IRS allowable adjustments to taxable income	
<b>NONTAXABLE INCOME</b>		
<b>12A</b>	Child support received for all children	
<b>12B</b>	Social security benefits for entire family	
<b>12C</b>	Other non-taxable income (see 32 then enter totals here)	
<b>13</b>	IRS total itemized deductions from IRS Schedule A	
<b>14</b>	Total federal tax paid (2009 IRS 1040 or 1040A)	
<b>15</b>	Self employment tax paid	
<b>16a</b>	Total medical/dental expenses not reimbursed by insurance companies	
<b>16b</b>	Total paid for medical/dental insurance plans	
<b>17</b>	Unusual expenses (see instructions)	

### Part 3 – FAMILY ASSETS AND DEBTS

<b>18A</b>	Home (if owned) Year purchased _____ PURCHASE PRICE \$ _____	Total property insurance carried \$ _____	Present market value \$ _____	Unpaid principal on first mortgage \$ _____	Annual payments on first mortgage \$ _____
<b>18B</b>	Do you have a second mortgage or equity loan on the home listed in 16A? Yes ___ No ___ If yes, describe purpose of loan.	Year of second mortgage	Year of equity loan	Unpaid principal on 2 <sup>nd</sup> mortgage/equity loan \$ _____	Annual payments on 2 <sup>nd</sup> mortgage/equity loan \$ _____
<b>18C</b>	Enter the total amount of unpaid principal and annual payments. →			Unpaid principal on all mortgages and equity loan(s) on your home \$ _____	Annual payments on all mortgages and equity loan(s) on your home \$ _____
<b>19</b>	All other real estate: Year purchased _____ PURCHASE PRICE \$ _____	Total property insurance carried \$ _____	Present market value \$ _____	Unpaid principal on all other real estate \$ _____	Annual payments on all other real estate \$ _____
<b>20</b>	Bank accounts — total of parents' checking and savings (interest-bearing and no-interest bearing) accounts				\$ _____
<b>21</b>	Investments — net value (stocks, bonds, mutual funds, etc. Do not include value of pensions, retirement plans, Keoghs, IRAs or SEPs.				\$ _____
<b>22A</b>	Debts – Outstanding balances: (see instructions)				\$ _____
<b>22B</b>	Amount in 22A planned to be paid during 2010				\$ _____
<b>22C</b>	Consumer debts (see instructions)				\$ _____
<b>23</b>	Complete item 23 only if you own a business and/or farm. (see instructions)	% of ownership	Assets \$ _____	Debts \$ _____	
<b>24</b>	Student assets (see instructions).	Student A	Student B	Student C	

### Part 4 – FAMILY EXPENSES AND ADDITIONAL INFORMATION

<b>25A</b>	How much can you afford for educational expenses for the 2010-2011 academic year for each student applicant? Do not leave blank.	Student A \$ _____	Student B \$ _____	Student C \$ _____
<b>25B</b>	How much can you afford for educational expenses for the 2010-2011 academic year for all students in item 27? Do not leave blank.	\$ _____		

CURRENT YEAR (2009-2010) (for all children entered in item 8e)

26. List all children, those applying for aid and those not applying for aid

Full name	b. Name of present child care, preschool, school or college (09/10)	c. Cost of child care, preschool, school or college	Grade in school or college	Age	Amount paid by Parent/guardian	Amount paid by financial aid	Amount paid by loan	Amount paid by students' assets	Amount paid by friends, relatives, trust funds, etc. (explain)
1.									
2.									
3.									
4.									

**NEXT YEAR (2010-2011) (for all children entered in item 8e)**

**27** List all children, those applying for aid and those not applying for aid. **List dollar amounts that will be available to cover school costs for 2010-2011.**

a. Full name	b. Name of child care, preschool, school or college (10/11)	c. Grade or year in school or college	Amount from parents' income & assets	Amount from child support or social sec.	Amount from students' assets	Amount from friends, relatives, trust funds, etc (explain)
1.						
2.						
3.						
4.						

		<b>2009</b>	<b>Estimated 2010</b>
<b>28</b>	If you do not own your home and rent your family residence, provide total amount of annual rent you paid for 2009 and what you estimate for 2010.	\$	\$
<b>29a</b>	Is there an employee retirement plan for parent/guardian in 6A?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
	Is there an employee retirement plan for parent/guardian in 6B?	Yes <input type="checkbox"/> No <input type="checkbox"/>	
<b>29b</b>	Total employment-related child care expenses in 2009	\$	
<b>29c</b>	Face value of parents' life insurance policies	\$	
<b>29d</b>	Annual cost of clubs requiring dues over \$250 in 2009. Specify name and type of club.	\$	
<b>29e</b>	Costs of camps and lessons in 2009. Specify the type or purpose of the camp(s) or lesson(s).	\$	
<b>29f</b>	Costs of vacations in 2009	\$	
<b>30</b>	List all family cars (if more than 3 attach documentation)		
	1. (make and year)	Own, lease, or provided by business? _____	
	2. (make and year)	Own, lease, or provided by business? _____	
	3. (make and year)	Own, lease, or provided by business? _____	
<b>31.</b>	Complete this item only if student applicants' parents are separated, divorced, or have never been married. Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Legally separated <input type="checkbox"/> Never Married <input type="checkbox"/> Year of divorce or separation _____ Is there a joint custody agreement _____		

<b>32. Nontaxable Income Workspace</b>		
	<b>2009</b>	<b>2010</b>
Payments to tax-deferred pension and savings plans as reported on W-2 form(s). Include amounts withheld from earnings for qualified retirement plans, such as 401(k) and 403(b) plans. Do not report amounts entered in 10A or 10B.	\$	\$
Pretax contributions or employer-provided untaxed income from fringe benefit plans (cafeteria or 125 plans).	\$	\$
Cash support, gifts, or money paid on your behalf (from relatives and non-relatives)	\$	\$
Household expenses and any money paid by separated or divorced spouse in lieu of child support.	\$	\$
Housing, food, and other living allowances (excluding rent subsidies for low income housing) paid on your behalf or to you as a member of the military, clergy, or other occupation (including cash payments and cash value of benefits), or contributions to your household income provided by other nondependent members.	\$	\$
Earned income credits, welfare benefits, veteran benefits, workers compensation	\$	\$
Income from tax-exempt investments.	\$	\$
Income earned abroad (Foreign Income Exclusion, IRS Form 2555, or 2555EZ)	\$	\$
Other untaxed income and benefits not included above.	\$	\$

**Use this space to explain any unusual circumstances or expenses.**



INSTRUCTIONS

<b>9F</b>	Enter all taxable income not reported elsewhere. Include pensions, annuities, rent, royalties, estates or trusts, household expenses paid by separated or divorced spouse in lieu of alimony, unemployment compensation, capital gains, etc. Include 2010 IRA. Refer to the IRS 1040 or 1040A.	
<b>17</b>	You may be asked to verify these amounts.	
	<p>Include:</p> <ul style="list-style-type: none"> <li>• Nursing home</li> <li>• Current legal fees</li> <li>• Closing costs for home purchases or refinancing</li> <li>• Sewer, street, and water installation assessment</li> <li>• Unreimbursed tuition for parents</li> <li>• Uninsured natural disasters</li> <li>• Child support in excess of \$5000</li> <li>• Special costs for a child with a disability</li> <li>• Funeral expenses</li> </ul>	<p>Do not include:</p> <ul style="list-style-type: none"> <li>• Anything covered in other questions (mortgages, consumer purchases, retirement plans, debt)</li> <li>• Car payments</li> <li>• Charity or church contributions</li> <li>• Childcare payments</li> <li>• Children’s school / college expenses</li> <li>• Payments for commuting</li> <li>• Household help payments</li> <li>• Payments for home repairs</li> <li>• Payments on insurance premiums</li> <li>• Payments for condo/association fees</li> </ul>
<b>22A</b>	Debts are outstanding balances on amounts borrowed.	
	<p>Include:</p> <ul style="list-style-type: none"> <li>• Past educational debts of parents</li> <li>• Encumbrances against home or other real estate (items 18, 19)</li> <li>• Past medical / dental expenses</li> <li>• Debts for investments (item 21)</li> <li>• Living expenses if business failure, prolonged illness, unemployment, etc. , have depleted assets</li> <li>• Past business debts</li> <li>• Uninsured natural disasters</li> <li>• Past funeral expenses</li> <li>• Past legal fees</li> </ul>	<p>Do not include:</p> <ul style="list-style-type: none"> <li>• Anything covered in other questions</li> <li>• Mortgages</li> <li>• Business, farm, car, or consumer debt (purchases charged to credit cards)</li> <li>• Debts for routine home repairs</li> <li>• Schooling expenses for children</li> <li>• Travel expenses</li> </ul>
<b>22C</b>	This total should include debts from purchases made to any credit cards. Do not include anything covered in items 16, 17, or 22a.	
<b>23</b>	Do not include information about your residence entered in item 18. Enter your share of net profit or loss from business/farm in item 9E and your salary or drawing account from self-employment in item 9A/9B. Indicate the kind of business/farm in area 32.	
<b>24</b>	If the application is being completed for more than one student applicant, be sure to enter the total assets for each in the same order as they appear in Part 1. Include educational savings plans, savings, IRA’s for the student, stocks, bonds, inheritances, trust funds, real estate, cash value of annuities and educational insurance policies. Explain any restrictions in area 32. Do not include life insurance policies, stamp or coin collections or the value of personal property.	