



# PRIVATE SCHOOL AID SERVICE

## Student Aid Form 2010-2011



### Diocesan Tuition Assistance Program for Families with Children Attending Catholic Schools (K-8)



This form must be received no later than **DECEMBER 31, 2009**.

For common questions and answers about filling out the application, or to check status of the application process, please go to [www.psas.org](http://www.psas.org).

#### TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

Please note the required tax year documentation.

1. Detailed copies of all pages and Schedules of your **2008** Federal Income Tax Return Form 1040, 1040A, or 1040EZ (**as filed with the IRS**) for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. If you file Schedule A, C, E or F, you must provide copies. If you have not yet filed, or are not required to file a tax return, see the REQUIRED DOCUMENTATION section of the INSTRUCTIONS.
2. Copies of all **2008** W-2 Wage and Tax Statement Forms, all **2008** 1099/1099R for Interest/Dividends, Pensions/Annuities and/or Misc. Income Forms for individuals listed in Sections A and B (**Please make sure all documentation is copied on regular 8 ½ x 11 paper**).
3. Documentation of TOTAL AMOUNTS received in **2008** for all Non-Taxable Income (see Section G for specific requirements).
4. Check or Money Order payable to PRIVATE SCHOOL AID SERVICE for the non-refundable application fee of \$21.00 (**All returned checks will incur an additional fee of \$25.00**).
5. This application form filled out in its entirety, signed and dated by the Parent(s) or Guardian(s) listed in Sections A and B.

**IMPORTANT: If the above items do not accompany this application, your application will not be considered complete.**

**Keep a copy of this completed application for your records.**

PARENT LAST NAME

STUDENT LAST NAME

# Student Aid Form • 2010 – 2011

• IMPORTANT: Print clearly and neatly with a ball point pen •

## A PARENT, GUARDIAN or OTHER ADULT RESPONSIBLE FOR TUITION

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_  
 Social Security Number \_\_\_\_\_ Age \_\_\_\_\_ (Area Code) Home Phone \_\_\_\_\_  
 Address \_\_\_\_\_ Apt. # \_\_\_\_\_ COUNTY OF RESIDENCE \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 (Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_

Employed by \_\_\_\_\_ How Long? \_\_\_\_\_ May PSAS contact you at work if there are questions?  Yes  No  
 If you are self-employed, check this box and refer to Section K of this form.

Are you Catholic?  Yes  No Parish Code\*: \_\_\_\_\_

## B PARENT, GUARDIAN or OTHER ADULT RESIDING WITH PARENT A

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_  
 Social Security Number \_\_\_\_\_ Age \_\_\_\_\_ (Area Code) Home Phone \_\_\_\_\_  
 Address \_\_\_\_\_ Apt. # \_\_\_\_\_ COUNTY OF RESIDENCE \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 (Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_

Employed by \_\_\_\_\_ How Long? \_\_\_\_\_ May PSAS contact you at work if there are questions?  Yes  No  
 If you are self-employed, check this box and refer to Section K of this form.

Are you Catholic?  Yes  No Parish Code\*: \_\_\_\_\_

## C DEPENDENTS (DO NOT LEAVE BLANK)

Number of dependent children who will attend a tuition charging school: daycare, Pre-K, elementary school, secondary school, or college in the fall of 2010. \_\_\_\_\_

Please list all dependent children in order of oldest to youngest, including college students. Indicate each dependent's relationship to Parent/Guardian A: child, foster child, grandchild, etc.

	Dependent Last Name	Dependent First Name	MI	Age	Relationship to Parent/Guardian A	Name of school student plans to enter in the fall of 2010 (PLEASE DO NOT ABBREVIATE) City/State	Grade in the fall of 2010	Is this child applying for aid for 2010-11? (check one)		Did this child receive aid in 2009-10? (check one)		Was this child in Catholic school in 2009-10? (check one)		Amount I/We feel I/We can pay toward tuition	Tuition charged yearly per student	School Code*
								YES	NO	YES	NO	YES	NO			
1						School Name: City/State:										
2						School Name: City/State:										
3						School Name: City/State:										
4						School Name: City/State:										
5						School Name: City/State:										

Please check if additional dependents are listed on a separate sheet.

\*Refer to School and Parish Code Lists

## D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2010-2011 school year:

Parents/Guardians \_\_\_\_\_ Children \_\_\_\_\_ Other\* \_\_\_\_\_

\*If Other, please explain relationship to Parent \_\_\_\_\_

2. Current marital status/housing arrangement of Parent/Guardian A:

- a.  Single, never Married\*      d.  Divorced\*      g.  Residing w/Significant Other  
 b.  Married      e.  Remarried\*      h.  Other: \_\_\_\_\_  
 c.  Widowed      f.  Separated\* \_\_\_\_\_

\*If Divorced, Remarried, Separated or Single, please complete Section E.

## E DIVORCED, SEPARATED OR SINGLE PARENTS (TO BE COMPLETED BY PARENT OR GUARDIAN LISTED IN SECTION A)

1. Date of separation (Month/Year) \_\_\_\_\_

2. Date of divorce (Month/Year) \_\_\_\_\_

3. Non-custodial parent \_\_\_\_\_  
 Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

4. Do you receive or pay child support?  Receive \$ \_\_\_\_\_ per year  
 Pay \$ \_\_\_\_\_ per year  
 Neither

5. Who claimed student as a tax dependent in 2008? \_\_\_\_\_

6. Who is responsible for the tuition for the dependent(s) listed in Section C?

- Father \_\_\_\_\_ % Name \_\_\_\_\_  
 Mother \_\_\_\_\_ % Name \_\_\_\_\_  
 Other \_\_\_\_\_ % Name \_\_\_\_\_\*

\*If tuition is shared, each responsible party must complete a Student Aid Form (SAF).

# F TAXABLE INCOME

The 2008 federal tax return for student's household was:

- Filed  
 Not filed yet (See **Required Documentation** section)  
 I/we do not file. I/we only receive non-taxable income

	Actual 2008	Estimate 2009
1. Total number of exemptions claimed on Federal Income Tax form:	<input type="text"/>	<input type="text"/>
2. Parent/Guardian A total taxable income from W-2 wages. (List total income for Parent A only)	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (List total income for Parent B only)	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedule C, E, and/or F from your IRS 1040) See 2008 1040 lines 12, 17 and 18	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2008 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2008 1040A lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 36 or 1040A line 20	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 37 or 1040A line 21	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 61 or 1040A line 37	\$ _____	\$ _____
9. Medical/dental expenses as reported on Schedule A line 1 of your IRS 1040 Form.	\$ _____	\$ _____

# G NON-TAXABLE INCOME

List the **total amount** received from 1/1/08-12/31/08 for **all** recipients in household. **DO NOT** list monthly amounts.

10. Child support	\$ _____ per year
11. Cash Assistance (TANF)	\$ _____ per year*
12. Food Stamps	\$ _____ per year*
a. Medicaid received in 2008?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)	\$ _____ per year*
a. Social Security income (SSI ONLY) (Provide documentation for all recipients in household.)	\$ _____ per year*
14. Student loans and/or grants received for PARENT's education. (Not college attending dependents or students listed in Section C.)	
a. total received in 2008	\$ _____
b. total used for household expenses	\$ _____ per year*
15. Housing Assistance (Sec. 8, HUD, etc.)	\$ _____ per year*
a. Religious Housing Assistance (parsonage, manse, etc.)	\$ _____ per year*
16. Other non-taxable income (Workers' Comp., Disability, Pension/Retirement, etc. Identify source(s) in Section L)	\$ _____ per year*
17. Loans/Gifts from friends or relatives	\$ _____ per year
18. Personal Savings/Investment Accounts used for household expenses (Do not include totals listed in Section I)	\$ _____ per year
19. Total non-taxable income for 2008	\$ _____ per year

\*You must provide 2008 YEAR-END documentation for items 11-16; either a Year-End Statement from the appropriate Public Agency, or documentation showing totals from 1/1/08 - 12/31/08.

# H HOUSING INFORMATION (DO NOT LEAVE BLANK)

20. Do you rent or own your residence?  Rent  Own (go to line 22)
21. If renting, what is the monthly rental payment? \$ \_\_\_\_\_
- a. Amount paid by household \$ \_\_\_\_\_ per month
- b. Amount paid by other source(s) \$ \_\_\_\_\_ per month
22. If you own your residence:
- a. What is the current market value? \$ \_\_\_\_\_
- b. What is the amount still owed, including home equity loans? \$ \_\_\_\_\_
- c. What is the monthly mortgage payment? \$ \_\_\_\_\_ per month

# I ASSETS & INVESTMENTS (AS OF 12/31/08)

23. Total amount in cash, checking, and savings accounts \$ \_\_\_\_\_
24. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities \$ \_\_\_\_\_
25. Total value of IRA, Keogh, 401K, SEP or other retirement accounts \$ \_\_\_\_\_
26. If you own real estate other than your primary residence,
- a. What is the fair market value? \$ \_\_\_\_\_
- b. What is the amount still owed? \$ \_\_\_\_\_
27. Do you own a business?  Yes  No
- If **Yes**, please go to **Section K**.
- a. What is the fair market value of your business? \$ \_\_\_\_\_
- b. What is the amount still owed? \$ \_\_\_\_\_
28. Do you own a farm?  Yes  No
- If **Yes**, please go to **Section K**.
- a. What is the fair market value of your farm? \$ \_\_\_\_\_
- b. What is the amount still owed? \$ \_\_\_\_\_

# J UNUSUAL CIRCUMSTANCES

Check all that apply to your situation within the past 12 months:

- |  |  |
|--|--|
| a. <input type="checkbox"/> Loss of job                    | i. <input type="checkbox"/> Death in the family          |
| b. <input type="checkbox"/> Recent separation/divorce      | j. <input type="checkbox"/> Shared custody               |
| c. <input type="checkbox"/> Change in family living status | k. <input type="checkbox"/> High debt                    |
| d. <input type="checkbox"/> Change in work status          | l. <input type="checkbox"/> Child support reduction      |
| e. <input type="checkbox"/> Bankruptcy                     | m. <input type="checkbox"/> Medical/Dental expenses      |
| f. <input type="checkbox"/> College expenses               | n. <input type="checkbox"/> Shared tuition               |
| g. <input type="checkbox"/> Income reduction               | o. <input type="checkbox"/> Other (Explain in Section L) |
| h. <input type="checkbox"/> Illness or injury              |  |

Go to next page ⇨

Parent/Guardian A:

SS#

Print Name

**K**

**BUSINESS INCOME ESTIMATE (2008 TOTALS)**

*(If you have not filed your 2008 Tax Return, and are Self-Employed, Own a Business, Rental Property and/or Farm DO NOT LEAVE BLANK)*

	Schedule C	Schedule E	Schedule F
1. What is your total estimated GROSS business taxable income?	\$ _____	\$ _____	\$ _____
2. What is your total NET business taxable income/loss?	\$ _____	\$ _____	\$ _____
3. If your business pays your home rent or mortgage, what is the annual total?		\$ _____	
4. If your business pays for your personal automobile, what is the annual total?		\$ _____	
5. If your business pays any portion of other personal expenses, list total amount and explain in SECTION L.		\$ _____	
6. If you own rental property: What was the total amount of Rental Income received?		\$ _____	

**L**

**EXPLANATIONS (USE THIS SPACE TO EXPLAIN ANY ANSWERS WHICH MAY NEED CLARIFICATION)**

**M**

**CERTIFICATION, AUTHORIZATION AND DOCUMENTATION CHECKLIST**

**WHAT IS NEEDED TO PROCESS THIS APPLICATION**

**(IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE CONSIDERED COMPLETE)**

- This application form filled out in its entirety, **SIGNED AND DATED BELOW** by the Parent or Guardian listed in Sections A and B.
- A check or money order made payable to **PRIVATE SCHOOL AID SERVICE** in the amount of \$21.00. *This is a non-refundable application fee.*
- 

**IF YOU HAVE FILED A 2008 IRS FORM 1040:**

A complete photocopy of your 2008 Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). 2008 W-2 Forms, 2008 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

**IF YOU HAVE NOT YET FILED A 2008 IRS FORM 1040:**

A complete photocopy of your most recent Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules). 2008 W-2 Forms, 2008 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). **If this application is submitted after April 15, 2009, you must provide a copy of the 2008 Extension for Filing Request, as approved by the IRS and a copy of your last filed tax return.**

**IF YOU DO NOT FILE AN IRS FORM 1040 AND RECEIVE ONLY NON-TAXABLE INCOME:**

Photocopies of your 2008 YEAR-END Social Services statement (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student Loans and/or grant documentation for parent's education, Social Security income statements showing **TOTAL AMOUNT** received in 2008 for **ALL** members of the household.

**SIGN HERE**

I/we declare that the information on this form is true, correct, and complete to the best of our knowledge. I/we authorize PRIVATE SCHOOL AID SERVICE to return this form and all attachments only to the schools and agencies named in Section C under contract with PSAS.

➔ Parent/Guardian A \_\_\_\_\_ Date \_\_\_\_\_ Parish Name: \_\_\_\_\_ Code: \_\_\_\_\_

Parent/Guardian B \_\_\_\_\_ Date \_\_\_\_\_

This Student Aid Form (SAF), all attachments and an analysis of your SAF are sent only to the school(s) or agencies contracting with PSAS. **You will not receive results from PSAS.** No other agency will see or receive any information about this application or its attachments.

**Mail to: PRIVATE SCHOOL AID SERVICE, P.O. Box 770728, Lakewood, Ohio 44107-0034**

Copyright ©2009 Private School Aid Service

## INTRODUCTION

**PRIVATE SCHOOL AID SERVICE (PSAS)** is under contract with the school, school system, or organization from which you obtained this application for tuition assistance. Our purpose is to provide a reasonable assessment of the ability of each family to pay for the education of their children at private and independent elementary and secondary schools.

Your Student Aid Form, all attachments, and an analysis of your SAF are sent **only** to the school(s) or agencies contracting with PSAS. **No other agency will receive any information about this application or its attachments.**

**PRIVATE SCHOOL AID SERVICE** does not make any decisions about recipients and amounts of financial aid awarded. Recipients and amounts of aid are determined by the designated school or agency. **YOU WILL NOT RECEIVE RESULTS FROM PRIVATE SCHOOL AID SERVICE.**

## INSTRUCTIONS

### **A & B** PARENT, GUARDIAN OR OTHER ADULT

This form should be filled out by the parent, guardian or other adult responsible for the tuition of the child or children attending a private or independent school contracting with PSAS. If the parents/guardians are divorced or separated, only the parent responsible for the tuition and any other adult residing in the household should fill out the form. If tuition is shared, each responsible party must complete a Student Aid Form (SAF) if financial aid is needed.

Answer *all questions* for both parent(s), stepparent(s), or guardian(s) responsible for tuition for the dependent(s) listed in Section C. **Do not leave any questions blank.** If natural parents are divorced, separated or single, answer all questions in Section E. If natural parents are divorced/separated and remarried, list information for custodial parent and new spouse. If either parent answers "self-employed," and has not filed a tax return, complete Section K.

**CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.**

### **C** STUDENT INFORMATION

List all dependent children residing in your household in order of oldest to youngest. Indicate the relationship to Parent/Guardian A listed in Section A of the application (i.e. child, grandchild, foster child, stepchild, etc.). If your dependents will be enrolled in any tuition charging school or agency next fall (including daycare, preschool, elementary school, high school, college, or trade school), list the name of the school, city and state where the school is located. List the grade your child(ren) will enter next fall (2010-2011); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

PSAS will consider all students listed in Section C with a check in the "Yes" box for tuition assistance at any school or agency under contract with PSAS. If the "No" box is checked, that student will not be considered. For all additional dependents, use a separate sheet.

**NOTE:** The information regarding tuition charged per student assists PSAS in making the most equitable analysis of your ability to pay for private education. If you are unsure, please estimate.

### **D** HOUSEHOLD INFORMATION

**ITEM 1:** Enter total number of individuals living in household. Include any college students claimed on the tax return. Do not include children who have moved out of the home. Include all family members dependent on and residing with parent listed in Section A.

**ITEM 2:** Check the appropriate box indicating custodial parents' marital status. If parents are divorced, separated or single, complete Section E.

### **E** DIVORCED, SEPARATED OR SINGLE PARENTS

If dependent(s) parents are divorced or separated, or do not reside in the same household, the custodial parent must provide the information requested in Section E about the non-custodial parent.

**If the date of separation took place in the year 2008, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2008. Be sure to estimate the income in Section F for 2009.**

**ITEM 4:** List the total amount of child support actually received by custodial parents listed in Sections A & B. If total received differs from court ordered amount, list only the total received.

**ITEM 6:** Indicate who is responsible for tuition and what percentage for the dependents listed in Section C.

### **F** TAXABLE INCOME

List all actual amounts for **2008** and estimated amounts for **2009**.

**ITEM 1:** Enter the total number of exemptions you claimed on your **2008** IRS Form 1040, 1040A, or 1040EZ.

**ITEM 2:** Enter the total **2008** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2008** W-2 forms and/or **2008** 1099 forms from all employers.

**ITEM 3:** Enter the total **2008** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2008** W-2 forms and/or **2008** 1099 forms from all employers.

**ITEM 4:** Enter the total net income from business (attach Schedule C or C-EZ), all rents, royalties, partnerships (attach Schedule E), and all farm income or loss (attach Schedule F). If you have received income from any of these sources and are estimating your income for **2008**, you must also fill out Section K of this application. (See **2008** 1040 lines 12, 17 and 18, enter sum total.)

**ITEM 5:** Enter the total of all other taxable income from interest, dividend income (attach Schedule B if over \$400), taxable refunds, credits or offsets of state and local income taxes, alimony received, capital gain or loss (attach Schedule D). List all capital gain distributions not previously reported, total IRA distributions (if rolled-over, explain in Section L), pensions and annuities, unemployment compensation, taxable social security benefits, and any other taxable income. **Attach copies of all Form 1099/1099R, and/or Form 1098 for Interest/Dividends, Pensions/Annuities or other misc. income. Attach copies of Social Security Income statements and Unemployment Compensation documentation for year-end 2008.** (See **2008** 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 or 1040A lines 8a-14b, enter sum total.)

**ITEM 6:** Enter allowable adjustments to income, such as IRA payments, self-employment tax, self-employed health insurance deduction, Keogh retirement plan and self-employed SEP deductions, penalty on early savings withdrawals, and alimony paid. Add together to arrive at your total adjustments. DO NOT include your standard deduction or deduction amounts for each family member. (See **2008** 1040 line 36 or 1040A line 20.)

**ITEM 7:** Enter total adjusted gross income as reported on your IRS Form 1040, 1040A or 1040EZ. Attach all pages of the applicable tax form (1040, 1040A, 1040EZ) for documentation. (See **2008** 1040 line 37 or 1040A line 21.)

**ITEM 8:** Enter the Total Tax paid (not withheld) as reported on your IRS Form 1040, 1040A, or 1040EZ. (See **2008** 1040 line 61 or 1040A line 37.)

**ITEM 9:** Enter the total of any medical and dental expenses reported on Schedule A line 1 of your IRS Form 1040 (attach Schedule A).



## **G** NON-TAXABLE INCOME

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2008** for all recipients in the household for the following: Cash Assistance (TANF), Food Stamps, Social Security income, Student loans and/or grants (received for PARENT's education), Housing assistance (Section 8, HUD, etc.), Worker's Compensation, Disability or Retirement.

**ITEM 10: Child support:** Report total amount received for **2008** for all children in the household.

**ITEM 11: Cash Assistance (TANF):** Report total amount received for **2008**.

**ITEM 12: Food Stamps:** Report total amount received for **2008**. Do not combine with TANF or Medicaid.

**ITEM 12a:** Did you receive Medicaid in **2008**?

**ITEM 13: Social Security benefits:** Report the total non-taxable (**SSA/SSD, etc**) amount received in **2008** for all recipients in household.

**ITEM 13a: Social Security benefits:** Report the total non-taxable (**SSI ONLY**) amount received in **2008** for all recipients in household.

**ITEM 14: Student loans and/or grants:** Report the total amount received in **2008** for **PARENT'S** education. Do not list loans, grants or scholarships received for dependents in Section C. Identify how much of this income was used for household expenses in **2008**.

**ITEM 15: Housing assistance:** Report the total amount received for **2008**. Identify in Section L all sources of Housing assistance (government assistance, Section 8, HUD, family/friends or other sources), including monies received toward rental/mortgage payments and/or utilities.

**ITEM 15a: Religious Housing assistance:** Report the total amount received for **2008**.

**ITEM 16: Other non-taxable income:** Report all additional non-taxable income received in **2008** including: Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.); food and other living allowances paid to members of the military, clergy or others; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); or any other untaxed benefit or income not subject to taxation by any government (Refugee Assistance, VA Educational Work-Study, etc.). Identify source(s) in Section L.

**ITEM 17: Loans/Gifts received from friends or relatives:** Report the total amount received in **2008**.

**ITEM 18: Personal Savings/Investment Accounts:** Report the total amount used in **2008** for household expenses.

**ITEM 19: Total non-taxable income for 2008:** Add together Items 10-18.

## **H** HOUSING INFORMATION

**ITEM 20 and 21:** If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

**ITEM 22a:** Determine the present value of the family home and list it. Local real estate agents should be able to help you if you are unsure.

**ITEM 22b:** Check with your lending institution and enter the amount still owed, including second mortgages.

## **I** ASSETS AND INVESTMENTS

**ITEM 23:** List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

**ITEM 24:** List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

**ITEM 25:** List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts.

**ITEM 26:** Answer Items 26a and 26b for any and all investment real estate (not including the family's primary residence), if applicable. Second homes, rental properties, and land contracts should be included.

**ITEM 27:** If you own a business, check the Yes box and answer Items 27a and 27b. If you have not filed your **2008** tax return, complete Section K of this application.

**ITEM 28:** If you own a farm, check the Yes box and answer Items 28a and 28b. If you have not filed your **2008** tax return, complete Section K of this application

## **J** UNUSUAL CIRCUMSTANCES

Check any and all items that apply to your situation. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

## **K** BUSINESS INCOME

**Provide 2008 Business Income Estimates if you have not filed your 2008 Tax Return.**

**ITEM 1:** List estimated total GROSS taxable business income for **2008**.

**ITEM 2:** List estimated total NET taxable business income/loss for **2008**.

**ITEM 3:** List the total amount paid by business in **2008** for home rent or mortgage.

**ITEM 4:** List the total amount paid by business in **2008** for personal automobile.

**ITEM 5:** List the total amount of personal expenses paid by business in **2008** that do not fall into one of the categories above.

**ITEM 6:** List total amount of estimated rental income received in **2008**.

If providing income estimates for more than one business, corporation or farm (Schedule C, Schedule E and/or Schedule F) please list information for each business, corporation or farm separately. Use additional sheet or Section L, if necessary.

## **L** EXPLANATION

If any specific question requires clarification, write a brief explanation in this space. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying.

## **M** PARENTS' CERTIFICATION, AUTHORIZATION, AND DOCUMENTATION CHECKLIST

You **must** sign the form in this section. Your signature authorizes PSAS to release the form and attachments to the contracting schools indicated in Section C. By signing the form, you also certify that the information submitted is correct. This application CANNOT be processed without the appropriate signature(s) and the appropriate documentation.

### REQUIRED DOCUMENTATION

#### **If you have filed your 2008 IRS Form 1040:**

You must submit photocopies of all pages of your **2008** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2008** W-2 Forms, **2008** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *Do not include your State tax return unless requested.*

#### **If you have not filed your 2008 IRS Form 1040:**

You must submit photocopies of all **2008** W-2 Forms, **2008** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s), and photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules). ***If this application is submitted after April 15, 2009, you must provide a copy of the 2008 Extension for Filing Request, as approved by the IRS.***

#### **If you are an Independent Contractor or self-employed and have not filed your 2008 IRS Form 1040:**

You must complete Section K and submit photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules), **2008** W-2 Forms, **2008** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2009, you must provide a copy of the 2008 Extension for Filing Request, as approved by the IRS.***

#### **If you receive non-taxable income:**

You must submit photocopies of your **2008** YEAR-END (01/01/08 - 12/31/08) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student loan and/or grant documentation (for PARENT's education), Social Security Income statements, showing the **TOTAL AMOUNT** received in **2008** for **ALL** members of the household. If you list any total for line 16, you must identify source(s) in Section L.

# ALONG WITH YOUR APPLICATION YOU MUST INCLUDE:

## Copies of your 2008 1040, 1040A or 1040EZ form (all pages)

Form **1040** Department of the Treasury—Internal Revenue Service **2008** U.S. Individual Income Tax Return

For the year Jan. 1-Dec. 31, 2008, or other tax year beginning \_\_\_\_\_, 2008, ending \_\_\_\_\_, 20 OMB No. 1545-0074

Label (See instructions on page 14.) Your first name and initial Last name Your social security number

Use the IRS label. Otherwise, please print or type. Home address (number and street). If you have a P.O. box, see page 14. Apt. no. You must enter your SSN(s) above.

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 14)  You  Spouse

Filing Status 1  Single 4  Head of household (with qualifying person). (See page 15.) If the qualifying person is a child but not your dependent, enter this child's name here. 2  Married filing jointly (even if only one had income) 3  Married filing separately. Enter spouse's SSN above and full name here. 5  Qualifying widow(er) with dependent child (see page 16)

Exemptions 6a  Yourself. If someone can claim you as a dependent, do not check box 6a. b  Spouse. c Dependents: (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) If qualifying child for child tax credit (see page 17) Boxes checked on 6a and 6b: No. of children on 6c who: • lived with you • did not live with you due to divorce or separation (see page 16) Dependents on 6c not entered above

Income 7 Wages, salaries, tips, etc. Attach Form(s) W-2 7 8a Taxable interest. Attach Schedule B if required 8a 8b Tax-exempt interest. Do not include on line 8a 8b 9a Ordinary dividends. Attach Schedule B if required 9a 9b Qualified dividends (see page 21) 9b 10 Taxable refunds, credits, or offsets of state and local income taxes (see page 22) 10 11 Alimony received 11 12 Business income or (loss). Attach Schedule C or C-EZ 12 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here  13 14 Other gains or (losses). Attach Form 4797 14 15a IRA distributions 15a b Taxable amount (see page 23) 15b 16a Pensions and annuities 16a b Taxable amount (see page 24) 16b 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E 17 18 Farm income or (loss). Attach Schedule F 18 19 Unemployment compensation 19 20a Social security benefits 20a b Taxable amount (see page 26) 20b 21 Other income. List type and amount (see page 28) 21 22 Add the amounts in the far right column for lines 7 through 21. This is your total income 22

Adjusted Gross Income 23 Educator expenses (see page 28) 23 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ 24 25 Health savings account deduction. Attach Form 8889 25 26 Moving expenses. Attach Form 3903 26 27 One-half of self-employment tax. Attach Schedule SE 27 28 Self-employed SEP, SIMPLE, and qualified plans 28 29 Self-employed health insurance deduction (see page 29) 29 30 Penalty on early withdrawal of savings 30 31a Alimony paid b Recipient's SSN 31 32 IRA deduction (see page 30) 32 33 Student loan interest deduction (see page 33) 33 34 Tuition and fees deduction. Attach Form 8917 34 35 Domestic production activities deduction. Attach Form 8903 35 36 Add lines 23 through 31a and 32 through 35 36 37 Subtract line 36 from line 22. This is your adjusted gross income 37

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 88. Cat. No. 11320B Form 1040 (2008)

## Documentation Checklist

- Copies of all pages of your 2008 IRS Form 1040, 1040A or 1040EZ including all Schedules.
- Copies of all W-2 and 1099 forms for individuals listed in Sections A and B. (All documentation should be copied on regular 8 1/2 x 11 paper)
- A check or money order for \$21.00 made payable to PRIVATE SCHOOL AID SERVICE. (All returned checks will incur an additional fee of \$25.00)
- A self-addressed stamped postcard or envelope if you require notification that PSAS has received your application (PSAS will not return any documentation).
- Copies of all required non-taxable income documentation.

## Copies of all 2008 W-2 forms FROM ALL EMPLOYERS

Form **W-2** Wage and Tax Statement **2008** Department of the Treasury—Internal Revenue Service

Copy C—For EMPLOYER'S RECORDS (See Notice to Employer on the back of Copy B)

Employee's social security number OMB No. 1545-0008

Employer identification number (EIN) 1 Wages, tips, other compensation 2 Federal income tax withheld

Employer's name, address, and ZIP code 3 Social security wages 4 Social security tax withheld 5 Medicare wages and tips 6 Medicare tax withheld 7 Social security tips 8 Allocated tips

Control number 9 Advance EIC payment 10 Dependent care benefits 11 Nonqualified plans 12a See instructions for box 12 12b 12c 12d 12e

Employee's first name and initial Last name Suffix 13 Sickness or disability pay 14 Other 15a 15b 15c 15d 15e

Employee's address and ZIP code 16 State wages, tips, etc. 17 State income tax 18 Local wages, tips, etc. 19 Local income tax 20 Locality name

Safe, accurate, FAST file

## Copies of all 2008 1099 forms (where applicable)

Form **1099-MISC** Miscellaneous Income **2008** OMB No. 1545-0119

PAYER'S name, street address, city, state, ZIP code, and telephone no. 1 Rents 2 Royalties 3 Other income 4 Federal income tax withheld

RECIPIENT'S name 5 Fishing boat proceeds 6 Medical and health care payments 7 Nonemployee compensation 8 Substitute payments in lieu of dividends or interest 9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale 10 Crop insurance proceeds 11 12 13 Excess golden parachute payments 14 Gross proceeds paid to an attorney 15a Section 408A deferrals 15b Section 408A income 16 State tax withheld 17 State/Payer's state no. 18 State income

Department of the Treasury - Internal Revenue Service

*If you do not have all of the documentation required:*

Contact the IRS for a transcript of your complete 1040, 1040A or 1040EZ, and any Schedules, etc.  
 Contact your employer for a copy of your W-2. Contact the appropriate company for a copy of your 1099.

# AVOIDING THE MOST COMMON ERRORS

**THE MOST COMMON ERROR THAT APPLICANTS MAKE IS SENDING THE APPLICATION INCOMPLETE. IN ORDER FOR AN APPLICATION TO BE REVIEWED, IT MUST INCLUDE:**

- All pages of your **2008** IRS Form 1040, 1040A, or 1040EZ (federal income tax return). **Do not send your state tax return, recap or tax summary.** (If you have not yet filed your **2008** IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- **2008** W-2 and/or 1099 forms for individual(s) listed in Sections A and B (**Please make sure all documentation is copied on regular 8 ½ x 11 paper**).
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of \$21.00. All returned checks will be subject to an additional \$25.00 fee.
  - ✓ Print clearly and neatly with a black or dark ball point pen.
  - ✓ **Make a photocopy of your completed Student Aid Form for your records.**
  - ✓ Do not staple ANYTHING to the Student Aid Form.
  - ✓ Submit the original application only.
  - ✓ Affix proper postage to the envelope (applications without sufficient postage will be returned by the post office).
  - ✓ If you would like to receive notification that PRIVATE SCHOOL AID SERVICE has received your application, enclose a self-addressed stamped postcard or envelope with your application.
  - ✓ Do not send any original documents. Originals will not be returned.

**PSAS CANNOT PROCESS YOUR APPLICATION IF YOU HAVE NOT INCLUDED THE REQUIRED DOCUMENTATION AND APPLICATION FEE.**

## OTHER COMMON ERRORS

### SECTIONS A & B

List the parent, guardian or other adult responsible for tuition and any other adult residing in the household. Complete each section in its entirety, including age, social security number, and name of employer. If you are self-employed, check the box and refer to Section K.

### SECTION C

List all dependent children, including college students, in order of oldest to youngest. *If any dependents will attend a tuition charging school next fall, fill in all columns for those children.*

### SECTION D

This section should include the total number of parents, children and other individuals residing in the household. Any household member listed as "Other" should be identified, using Section L if necessary for explanation.

### SECTION E

This section should be completed by the custodial parent with information about the non-custodial parent.

### SECTION F

Answer Items 1–9 for BOTH **2008** and **2009**. *YOU MUST include documentation of all income received by both parents/guardians residing with the applicant(s).* If you are divorced or separated and receive child support, list the yearly amount in Section G Item 10.

### SECTION G

List the **YEARLY** amounts received for Items 10-19. *Remember, do not list monthly amounts.*

### SECTION H

If you rent your home, list your monthly rental payment, including any payments made by sources other than the household. If you own your home, answer items 22a, b, and c.

### SECTION I

Enter the totals for Items 23, 24, and 25 based on your investment, savings, and/or checking statements. If you own rental or investment property, answer items 26a and 26b. *You must include Schedule E from your IRS Form 1040.*

If you answered "Yes" to Item 27 or 28 and are estimating **2008** income, complete Section K of the application. *You must include Schedule C, E and/or Schedule F from your IRS Form 1040.*

### SECTION J

Check boxes for any unusual or relevant circumstances which affect the applicant. If you feel that your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

### SECTION K (If estimating 2008 income)

Answer each question that pertains to your estimated income.

### SECTION L

If you feel that any specific question requires clarification and/or an explanation, write a brief summary in the space provided.

### SECTION M

Confirm that you have attached ALL REQUIRED DOCUMENTATION and that you have signed the application.



**Diocesan Financial Assistance Program for Families with Children Attending Catholic Schools**

**PARISH CODE LIST**

<b>CODE</b>	<b>PARISH NAME</b>	<b>CITY</b>	<b>CODE</b>	<b>PARISH NAME</b>	<b>CITY</b>
01670.....	St. John Church.....	Allentown	03310.....	Christ the King.....	Long Branch
03130.....	Holy Spirit Church.....	Asbury Park	03910.....	The Parish of St. Thomas More.....	Manalapan
03250.....	Our Lady of Mt. Carmel Church.....	Asbury Park	03550.....	St. Denis Church.....	Manasquan
03330.....	St. Agnes Church.....	Atlantic Highlands	02360.....	Our Lady of Perpetual Help Church.....	Maple Shade
03590.....	St. Elizabeth Church.....	Avon	03610.....	St. Gabriel Church.....	Marlboro
04730.....	St. Mary Church.....	Barnegat	02660.....	St. Isaac Jogues Church.....	Marlton
04190.....	Sacred Heart Church.....	Bay Head	02680.....	St. Joan of Arc Church.....	Marlton
04300.....	St. Barnabas Church.....	Bayville	03530.....	St. Clement Church.....	Matawan
03890.....	St. Rose Church.....	Belmar	02800.....	St. Mary of the Lakes Church.....	Medford
02840.....	St. Mary Roman Catholic Church.....	Bordentown	03490.....	St. Catherine Church.....	Middletown
03010.....	Church of the Ascension.....	Bradley Beach	03750.....	St. Mary Catholic Church.....	Middletown
04470.....	St. Francis Church.....	Brant Beach	03695.....	St. Joseph Church.....	Millstone Township
04050.....	Church of Epiphany.....	Brick Town	03070.....	Church of Precious Blood.....	Monmouth Beach
04090.....	Church of the Visitation.....	Brick Town	02320.....	Our Lady of Good Counsel Church.....	Moorestown
04410.....	St. Dominic Church.....	Brick Town	02120.....	Christ the Redeemer Church.....	Mount Holly
02520.....	St. Ann Church.....	Browns Mills	02440.....	Sacred Heart Church.....	Mount Holly
02880.....	St. Katharine Drexel.....	Burlington	02720.....	St. John Neumann Church.....	Mount Laurel
02600.....	St. Charles Borromeo Church.....	Cinnaminson	03110.....	Holy Innocents Church.....	Neptune
03790.....	St. Mary Catholic Church.....	Colts Neck	03290.....	Our Lady of Providence Church.....	Neptune
03770.....	St. Mary of the Assumption Church.....	Deal	04010.....	Church of the Assumption.....	New Egypt
02280.....	Resurrection Parish.....	Delran	01580.....	St. James Church.....	Pennington
03190.....	Immaculate Conception Church.....	Eatontown	04650.....	St. Martha Church.....	Point Pleasant
03570.....	St. Dorothea Catholic Church.....	Eatontown	04810.....	St. Peter Church.....	Point Pleasant Beach
01160.....	Incarnation-Saint James Parish.....	Ewing	01790.....	St. Paul Catholic Church.....	Princeton
03050.....	Church of the Nativity.....	Fair Haven	01430.....	St. David the King Church.....	Princeton Junction
03510.....	St. Catherine Church.....	Farmingdale	03390.....	St. Anthony Church.....	Red Bank
02200.....	St. Francis and St. Clare Parish.....	Florence Township	03630.....	St. James Catholic Church.....	Red Bank
04840.....	St. Pius the Tenth Church.....	Forked River	02920.....	Jesus, the Good Shepherd.....	Riverside
03850.....	St. Robert Bellarmine Church.....	Freehold	02480.....	Sacred Heart Church.....	Riverton
03870.....	St. Rose of Lima Church.....	Freehold	03030.....	Church of Holy Cross.....	Rumson
02400.....	Our Lady Queen of Peace Church.....	Hainesport	03730.....	St. Mark Catholic Church.....	Sea Girt
01250.....	Our Lady of Sorrows- St. Anthony Parish.....	Hamilton	04160.....	Our Lady of Perpetual Help Church.....	Seaside Heights
01520.....	St. Gregory the Great Church.....	Hamilton	04370.....	St. Catharine Church.....	Seaside Park
01850.....	St. Raphael-Holy Angels Parish.....	Hamilton	03430.....	St. Catharine Church.....	Spring Lake
01940.....	St. Vincent de Paul Church.....	Hamilton	02240.....	Holy Eucharist Church.....	Tabernacle
01370.....	St. Anthony of Padua.....	Hightstown	01490.....	St. George Catholic Church.....	Titusville
03410.....	St. Benedict Church.....	Holmdel	04540.....	St. Joseph Church.....	Toms River
03470.....	St. Catharine Church.....	Holmdel	04580.....	St. Justin Church.....	Toms River
01310.....	St. Alphonsus Catholic Church.....	Hopewell	04620.....	St. Luke Church.....	Toms River
03930.....	St. Veronica Church.....	Howell	04770.....	St. Maximilian Kolbe Church.....	Toms River
03950.....	St. William the Abbot Church.....	Howell	01010.....	Blessed Sacrament-Our Lady of the Divine Shepherd Parish.....	Trenton
04780.....	St. Monica Church.....	Jackson	01070.....	Divine Mercy Parish.....	Trenton
04230.....	St. Aloysius Church.....	Jackson	01640.....	Our Lady of the Angels Parish.....	Trenton
02510.....	St. Andrew.....	Jobstown	01280.....	Sacred Heart Church.....	Trenton
03350.....	St. Ann Church.....	Keansburg	01550.....	St. Hedwig Church.....	Trenton
03090.....	Holy Family Church.....	Keyport	01700.....	St. Joseph Catholic Church.....	Trenton
03210.....	Jesus, the Lord Church.....	Keyport	01730.....	St. Mary Catholic Church.....	Trenton
03690.....	St. Joseph Catholic Church.....	Keyport	04880.....	St. Theresa Catholic Church.....	Tuckerton
04510.....	St. John Church.....	Lakehurst	03370.....	St. Anselm Church.....	Wayside
04270.....	St. Anthony Claret.....	Lakewood	03810.....	St. Michael Church.....	West End
04690.....	St. Mary of the Lake Church.....	Lakewood	03650.....	St. Jerome Church.....	West Long Branch
04340.....	St. Pio of Pietrelcina.....	Lavallette	01220.....	Our Lady of Good Counsel Church.....	West Trenton
01340.....	Church of St. Ann.....	Lawrenceville	04450.....	St. Elizabeth Ann Seton Church.....	Whiting
03710.....	St. Leo the Great Church.....	Lincroft	02160.....	Corpus Christi Church.....	Willingboro

**Diocesan Financial Assistance Program for Families with Children Attending Catholic Schools**

**SCHOOL CODE LIST**

<u>CODE</u>	<u>SCHOOL NAME</u>	<u>CITY</u>
5825.....	Our Lady of Mount Carmel .....	Asbury Park
5882.....	Mother Teresa Regional School.....	Atlantic Highlands
5827.....	St. Rose .....	Belmar
5829.....	St. Mary .....	Bordentown
5830.....	St. Dominic.....	Brick Town
5832.....	St. Paul .....	Burlington
5833.....	St. Charles Borromeo .....	Cinnaminson
5836.....	St. Rose of Lima .....	Freehold
5839.....	St. Benedict.....	Holmdel
5841.....	St. Veronica .....	Howell
5842.....	St. Aloysius.....	Jackson
5846.....	Holy Family School .....	Lakewood
5847.....	St. Leo the Great.....	Lincroft
5849.....	All Saints Catholic Regional.....	Manahawkin
5850.....	St. Denis .....	Manasquan
5851.....	Our Lady of Perpetual Help.....	Maple Shade
5852.....	St. Joan of Arc.....	Marlton
5853.....	St. Mary of the Lakes.....	Medford
5854.....	Our Lady of Good Counsel.....	Moorestown
5855.....	Sacred Heart .....	Mount Holly
5856.....	Holy Innocents.....	Neptune
5857.....	St. Mary .....	New Monmouth
5858.....	St. Peter.....	Point Pleasant Beach
5859.....	St. Paul .....	Princeton
5860.....	St. James.....	Red Bank
5864.....	Holy Cross School .....	Rumson
5865.....	St. Catharine .....	Spring Lake
5866.....	St. Joseph.....	Toms River
5870.....	Incarnation.....	Trenton/Ewing
5880.....	Trenton Catholic Academy .....	Trenton/Hamilton
5876.....	St. Raphael .....	Trenton/Hamilton
5875.....	St. Gregory the Great.....	Trenton/Hamilton Square
5873.....	St. Ann.....	Trenton/Lawrenceville
5872.....	Our Lady of Sorrows .....	Trenton/Mercerville
5877.....	St. Jerome .....	West Long Branch
5838.....	Pope John Paul II Regional School .....	Willingboro

**LIST SCHOOL CODE IN SECTION C**