

Student Aid Form



OFFICE USE ONLY Barcode



code



Diocesan Tuition Assistance Program for Families with Children Attending Catholic Schools (K-12)

This form must be submitted no later than MAY 15, 2016.

For common questions and answers about filling out the application, or to check status of the application process, please go to <u>www.psas.org</u>.

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

Please note: This application requires documentation for income received in 2015.

- Detailed copies of all pages and Schedules of your 2015 Federal Income Tax Return Form 1040 1040A, or 1040EZ (as filed with the IRS) for individuals listed in Sections A and B. <u>Recaps and/or Summary Forms are not acceptable</u>. If you file Schedule(s) A, C, E, F or a statement of dependence, you must provide copies. If you earned income outside the US, provide all income documentation. If you have not yet filed, or are not required to file a tax return, see the REQUIRED DOCUMENTATION section of the INSTRUCTIONS.
- Copies of all 2015 W-2 Wage and Tax Statement Forms, all 2015 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 8¹/2 x 11 paper - documentation <u>CANNOT</u> be returned).
- 3. Documentation of TOTAL AMOUNTS received in **2015** 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 \$31.00. Payment by check or electronic funds transfer (ACH) is your express authorization that if the payment is returned unpaid for any reason you consent to have your bank account electronically debited twice by PSAS or its third party payment processor or collections agency. One debit will recover the item amount and the second debit will be the charge for applicable returned check and collection fees as allowed by law.
- 5. This application form filled out in its entirety, signed and dated by the individuals listed in Sections A and B.

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

PSAS does not make final financial aid decisions. You will not receive results from PSAS. For more comprehensive instructions, please visit <u>www.psas.org/instructions</u>.

Keep a copy of this completed application and all documentation for your records.

Form #092 (2015)

To check the processing status of your application, go to <u>www.my.psas.org</u>.

Form #092 (20	015)		STU	DEN	T AID FC	RM 🖊	20	16	-20	17						
A Parent, Respons	Guardian, or (sible for Tuitio	Other /	Adult			B Paren Resid	nt, Gu ling w	ardi /ith	an, o Parer	[.] Othe t A	r Adu	lt				
Check One: O Fa	ther O Mother	O Step	-Father	O Step-Mot	ther O Other Adult	Check One: O	Father	• •	Mothe	r O St	ep-Fat	her 🤇	C Step-I	Mother	r 🔾 Ot	her Aduli
Last Name		First N	ame		M.I.	Last Name				First	Name				M.I.	
Social Security Num	nber	D	ate of Birth	1		Social Security N	Numbei				Date o	of Birth				
Address	Apartm	ent # (if	applicable	e) COUNT	Y OF RESIDENCE	Address			Apar	tment #	(if appl	icable)	COU	INTY C	OF RESI	DENCE
City			State	e	Zip Code	City						State			Zip C	ode
() (Area Code) Primar	y Phone	((A	rea Code)	Secondary	Phone	() (Area Code) Pri	mary P	hone			((Area (). Code):	Seconda	ary Ph	one	
E-mail Address (R	EQUIRED FOR A	L CORI	RESPONE	DENCE)		E-mail Address	s (REQ	UIRE	D FOR	ALL CO	RRES	POND	ENCE)			
Employed by Preferred Contact:		. 0	Coopdar	v Phone	How Long?	Employed by Preferred Conta	unti ()	Drim				andon	Phone	-	low Long E-mail	?
Go Green: Che	ck this box if you w	ish to	lf you a	are self-emp	loyed, please check	Go Green: (Check t	his bo	x if you	wish to		f you ai	re self-er	mploye	ed, pleas	
	Spondence electro				n K of this form.	receive all co Are you Catholi				,					of this fo	rm.
C Depend	List all	depende	nt childre	n in order of	oldest to youngest, <u>i</u>	including college s	student	s, eve	en if you	are not	applyi					icate
Depend	each de	ependen	's relatior	to Parent/G	uardian A: child, fos	ter child, grandchi	ild, etc.	DOI	IOT LE	AVE BL	ANK.					
DO NOT LEAVE				Numbe	er of dependent child	lren who will atten	id a tui	ion c	harging	school	in the f	all of 2	2016?			
DO NOT LEAVE	= BLANK	in Dayca	re:	# in Pre-K:	# in Element	tary School:	# in	Seco	ndary So	hool:	#	# in Coll	lege:		Total:	
Dependent Last Name	Dependent First Name	M.I.	Date of Birth	Relation to Parent/ Guardian A	Name, city, and state plans to attend in the DO NOT LEAVE BLAN	he Fall of 2016.	Grade in the fall of 2016	apply Aid	for 2017? 2	Did this ild receive aid in 015-2016 res No	e in Ca Sch ? 2015	atholic ool in -2016?	Amount feel I/We pay tov tuition (PER YE	e can ward n?	Tuition charged yearly per student?	School Code*
1					School N	Name		_	_	_	_		(FER TE			
					City and	State		0	0	o c	0	0				
2					School N City and		-	0	0	oc	0	0				
3					School N	Name		0	0	o c	0	0				
					City and											
4					School N City and		-	0	0	oc	0	0				
5					School N City and		-	0	0	o c	0	0				
Please check if	f additional deper	idents a	re listed o	on a separa		etato					*Ref	er to S	School a	Ind Pa	arish Coo	de Lists
D Househ	old Informa	tion														
1. Number of indiv	viduals who will res	ide in m	//our hous	ehold during	g the 2016-2017	2. Current mari					-					
school year: Parents/Guardia	ans (Children		_ Other* _		O a. Single, O b. Married		/larrie		d. Divor e. Rem			g. Residi n. Other:			
*If Other , pleas	e explain					C. Widowe *If Single, Div		Rema		f. Sepa r Separa		ou are i			Section L nplete Se	
E Single,	Divorced, R	emarı	ied, or	Separa	ted Parents (T	o be complete	ed by	the	Paren	t/Guar	dian l	isted	in Sec	ction	A)	
1. Date of separation	on (Month/Year)					2. Date of divord	e (Mon	th/Ye	ar)							
3. Non-custodial pa	· · · · ·					4. Who claimed				endent	in 2015	5? <u> </u>				
5. Who is responsib	ble for the tuition fo	· · · · ·		listed in Se	ction C?		1				-				(per year)	
Father Name:			of students responsible	e for:				paid (p	nt of tuitic er stude	nt):	%	Rece		Paid \$		Neither
Mother Name:			of students s responsib	le for:					nt of tuitic er stude		%	Rece	eived	Paid \$		Neither
Other Name:		Names	of students						nt of tuitic er stude		(Rece	eived	Paid \$		Neither

*If the person(s) above is/are responsible for additional students, please list in Section L.

Taxable Income (Answers in US\$ ONLY)

F

	The 2015 federal tax return for student's househ	old was:		List the total amount received from 1/1/15-12/31/15 for a DO NOT list monthly amount		household
	O Filed			10. Child Support	\$	_ per year
	 O Not filed yet (See Required Documental O I/We do not file. I/We only receive non-tax 		to Section G	11. Cash Assistance (TANF)	\$	per year*
		A stual 2015	Estimate 2010	12. Food Stamps (SNAP)	\$	_ per year*
1	. Total number of exemptions claimed on Federal	Actual 2015	Estimate 2016	a. Medicaid received in 2015? O Yes O No		
	Income Tax form.			13. Social Security income (SSA/SSD, etc.)		
2	Parent/Guardian A total taxable income from W-2	•	•	(Provide documentation for all recipients in household.)	\$	_ per year*
	wages (Box 1). Total income for Parent A only	\$	\$	a. Social Security income (<u>SSI Only</u>) Total received in 2015	\$	*
3	Parent/Guardian B total taxable income from W-2 wages (Box 1). Total income for Parent B only	\$	\$	(Provide documentation for all recipients in household	.)	_
4	Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K)			14. Student loans and/or grants received for PARENT's educati (Not college attending dependents or students listed in Sec		
	(Attach Schedules C, E, and/or F from your IRS 1040) See 2015 1040 lines 12, 17, and 18	\$	¢	a. Total received in 2015	\$	_*
5	Other non-work taxable income from interest.	Ψ	Ψ	b. Total used for living expenses	\$	_ per year*
0	dividends, alimony, unemployment, and non-			15. Housing Assistance (Sec. 8, HUD, etc.)	\$	_ per year*
	business income. See 2015 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2015 1040A lines 8a-14b	\$	\$	a. Religious Housing Assistance		
6	Allowable "Adjustments to Income" as reported on			(parsonage, manse, etc.) Total received in 2015	s	*
	your IRS 1040, 1040A, or 1040EZ.	\$	¢	16. Other non-taxable income (Working for cash, Adoption an	d/	_
7	See 2015 1040 line 36 or 1040A line 20	۵	۵	or Foster Subsidy, Worker's Comp., Disability, Pension/	~	
1	. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ.			Retirement, etc. Identify source(s) in Section L)	\$	_ per year*
	See 2015 1040 line 37 or 1040A line 21	\$	\$	 Any and all Military/VA Benefits and/or Compensation Total received in 2015 (Identify source(s) in Section L) 	s	per year*
8	. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ. See 2015 1040 line 63 or 1040A			17. Loans/Gifts from friends or relatives	\$	
	line 39	\$	\$	18. Personal Savings/Investment Accounts used for household		
9	a. Medical/Dental expenses as reported on Schedule	<u>^</u>	<u>^</u>	expenses (Do not include totals listed in Section I)	\$	_ per year
	A, line 1 of your IRS 1040 form.	\$	\$	19. Total non-taxable income for 2015	\$	per year
9	b. Charitable Contributions as reported on Schedule A, line 19 of your IRS 1040 form.	\$	\$	*You must provide 2015 YEAR-END documentation for items 11-1 from the appropriate Public Agency, or documentation showing		
	Housing Information (DO NC	OT LEAVE BLA	NK)	Assets & Investments (Current Va	lues)	
2	0 De veu cent er euro veur regidence?	O Rent O C	Own (go to line 22)	22. Total amount in each checking, and equipped accounts	¢	
2	0. Do you rent or own your residence?	C Rent CC	Jwn (go to line 22)	23. Total amount in cash, checking, and savings accounts24. Total value of money market funds, mutual funds,	\$	_
2	1. If renting, what is the monthly rental payment?	\$		stocks, bonds, CDs, or other securities	\$	_
	a. Amount paid by household	\$	per month	25. Total value of IRA, Keogh, 401K, SEP, or other		
	b. Amount paid by other source(s)	\$	per month	retirement accounts	\$	-
	c. Are you current on your monthly payment?	O Yes O N	lo	 a. What was your total contribution to your retirement account(s) in 2015 (IRA, Keogh, 401K, SEP, etc.)? 		
				26. If you own real estate other than your primary residence	e:	
	If No, what was the total amount paid in 20	15? \$		a. What is the fair market value?	\$	_
2	2. If you own a residence:			b. What is the amount still owed?	\$	_
	a. What is the current market value?	\$		27. Do you own a business? O Yes O No If Yes, please go to Section	n K	
	b. What is the amount still owed, including			a. What is the fair market value of your business?	\$	
	home equity loans?	\$		b. What is the amount still owed?	Ψ \$	-
	c. What is the monthly mortgage payment?	\$	per month	28. Do you own a farm? O Yes O No	*	_
		↓ 		If Yes, please go to Section	n K.	
	d. Are you current on your monthly payment?	O Yes O N	10	a. What is the fair market value of your farm?	\$	_
_	If No, what was the total amount paid in 20	15? \$		b. What is the amount still owed?	\$	_
	J Unusual Circumstances (Ch	eck all that app	oly to your situa	ation within the past 12 months)		
_		Dandan (
	a. Loss of job	e. Bankrupto	-		dical/Dental exper	ises
	b. Recent separation/divorce	f. College e. g. Income re			ared tuition	
		 g. Income re h. Illness or 		K. High debt O. Oth I. Child support reduction	ner (explain in Sec	tion L)
				e comprehensive instructions visit <u>www.psas.org/instructions</u> .	Go to nex	d page 📫
	resop a copy of this completed application and all u	southernation for yo		somprononorio monucliono man <u>www.pada.org/manucliona</u> .		

Parent/Guardian A: Print Name	SS#: _		
K Business Owners or Self-Employed Individuals (2015 Estimates)			
If you have not filed your 2015 Tax Return, and are Self-Employed, own a business, rental property, and/or a farm please provide an estimate of your income - DO NOT LEAVE BLANK	Schedule C	Schedule E	Schedule F
1. What is your total estimated GROSS business income?	\$	\$	\$
2. What is your total NET business taxable income/loss? (DO NOT LEAVE BLANK)	\$	\$	\$
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 S	Section L.	\$	
6. If you own rental property: What was the total amount of Rental Income received?		\$	
Explanations (Use this space to explain any answers which may need c	larification.)		
	/		

Certification, Authorization, and Documentation Requirements

WHAT IS REQUIRED TO PROCESS THIS APPLICATION

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

1. This application form filled out in its entirety, SIGNED AND DATED BELOW by the Parent(s)/Guardian(s) listed in Sections A and B. 2. A check or money order made payable to PRIVATE SCHOOL AID SERVICE in the amount of \$31.00. This is a non-refundable application fee

If you have filed a 2015 IRS Form 1040:	If you have not ye 2015 IRS Form 3		Form 1040 A	not file an IRS AND receive only
A complete photocopy of your 2015	A complete photocopy of your most rec		non-tax	able income:
Form 1040, 1040A, or 1040EZ (as filed	or 1040EZ (as filed with the IRS, with W-2 Forms, 2015 1099/1099R, or 109	· · · · · · · · · · · · · · · · · · ·		15 YEAR-END Social Services
with the IRS, including all Schedules).	earning adult residing with the applican			. Food Stamp documentation, umentation, Student Loans and/
2015 W-2 Forms, 2015 1099/1099R,	is submitted after April 15, 2016, you		U U	for parent's education, Social
or 1098 Forms for any wage-earning	of the 2015 Extension for Filing Req			ents showing TOTAL AMOUNTS
adult residing with the applicant(s).	the IRS and a copy of your last filed	l tax return.	received in 2015 for ALL	members of the household.
	blication is available for an additional \$5 fee. additional \$5 with your processing fee if you			
YOU <u>MUST</u> PROVIDE AN EMAIL ADD APPLICATION.	RESS IN SECTION A (REQUIRED) AND S	ECTION B (if applicable)	TO RECEIVE ANY CORRES	PONDENCE REGARDING YOUR
Checkout	Non-Refundable Application	Processing Fee	\$31.00	
	Electronic Recap Fee (optio	nal)	\$5.00	
SIGN HERE	*Please make checks payable to	o PSAS	Total	
the schools and programs named in Section C u	true, correct, and complete to the best of my/our knu inder contract with PSAS. I/We understand that the school for the children listed in Section C, and I/We y the Diocese Of Trenton on my behalf.	Diocese Of Trenton and Paren	t A and Parent B can change the	schools and programs named in Section
► Parent/Guardian A	Date	Parish Name:		Code:
Parent/Guardian B	Date			
	nts and an analysis of your SAF are sent only results from PSAS. No other agency will see			
м	ail completed application and ph	otoconios of all do	cumentation to:	

Questions? Call: (440) 892-4272 Copyright © 2015 Private School Aid Service

Keep a copy of this completed application and all documentation for your records. For more comprehensive instructions visit www.psas.org/instructions.

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. If you provide your email address to PSAS, it will be used for application related communication only. Your email address will also be provided to the organizations you list in Section C as part of your application. Your email address will not be shared with any other third party.

CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.

Student Information

List all dependent children residing in your household in order of oldest to youngest. Indicate date of birth and the relation 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 (**2016-2017**); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

If "No" is checked for a student listed in Section C, that student will not be considered for tuition assistance. 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 the 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 the parent listed in Section A.

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

Single, Divorced, Remarried, or Separated 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 2015, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2015. Be sure to estimate the income in Section F for 2016.

ITEM 5: Indicate who is responsible for tuition and what percentage for the dependents listed in Section C. List the total amount of child support actually received by custodial parents listed in Sections A & B. List the total amount received and the total amount paid for **2015**.

Taxable Income (Answers in US\$ ONLY)

List all actual amounts for 2015 and estimated amounts for 2016.

ITEM 1: Enter the total number of exemptions you claimed on your **2015** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2015** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2015** W-2 forms and/or **2015** 1099 forms from all employers.

ITEM 3: Enter the total **2015** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2015** W-2 forms and/or **2015** 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 **2015**, you must also fill out Section K of this application. (See **2015** 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 2015. (See 2015 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 **2015** 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 **2015** 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 **2015** 1040 line 63, or 1040A line 39.)

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

ITEM 9b: Enter the total amount of Charitable Contributions as reported on Schedule A, line 19 of your IRS Form 1040 (attach Schedule A).

Keep a copy of this completed application and all documentation for your records. For more comprehensive instructions visit <u>www.psas.org/instructions</u>.

G Non-Taxable Income (Answers in US\$ ONLY)

If you receive non-taxable income, you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2015 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 **2015** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for 2015.

ITEM 12: Food Stamps (SNAP): Report total amount received for **2015**. Do not combine with TANF or Medicaid.

ITEM 12a: Did you receive Medicaid in 2015?

ITEM 13: Social Security benefits: Report the total non-taxable (**SSA/SSD, etc.**) amount received in **2015** for all recipients in household.

ITEM 13a: Social Security benefits: Report the total non-taxable (**SSI ONLY**) amount received in **2015** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2015** for PARENT'S education. <u>Do not list loans, grants or scholarships received for dependents in Section C</u>. Identify how much of this income was used for household expenses in **2015**.

ITEM 15: Housing assistance: Report the total amount received for **2015**. 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 **2015**.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in **2015** including: Working for cash, Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; 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); adoption and/or foster care subsidy, or any other benefit or income not subject to taxation by any government (Refugee Assistance, etc.). Identify source(s) in Section L.

ITEM 16a: Any and all Military/VA Benefits and/or Compensation: Provide your Leave and Earnings Statement (if applicable) and report the total amount received for 2015 of food and other living allowances paid to members of the military, veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.), 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 **2015**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2015** for household expenses.

ITEM 19: Total non-taxable income for 2015: Add together Items 10-18.

H Housing Information

ITEMS 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 21c: Indicate whether you are current on your monthly rental payment and if not, what the actual amount was that you paid in **2015**.

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.

ITEM 22d: Indicate whether you are current on your monthly mortgage payment and if not, what the actual amount was that you paid in **2015**.

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. List total amount contributed in **2015** for Item 25a.

ITEM 26: Answer Items 26a and 26b for any and all investment real estate (not including the family's primary residence), if applicable. **Do not list the value of your home.** 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 **2015** 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 **2015** tax return, complete Section K of this application.

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 and also include a letter of explanation with this application.

K Business Income

Provide 2015 Business Income Estimates if you have not filed your 2015 Tax Return.

ITEM 1: List estimated total GROSS business income for 2015.

ITEM 2: List estimated total NET taxable business income/loss for 2015.

ITEM 3: List the total amount paid by business in **2015** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2015** for personal automobile. **ITEM 5:** List the total amount of personal expenses paid by business in **2015** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in 2015.

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.

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 Certification, Authorization, and Documentation Requirements

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 2015 IRS Form 1040:

You must submit photocopies of all pages of your **2015** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2015** W-2 Forms, **2015** 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 2015 IRS Form 1040:

You must submit photocopies of all **2015** W-2 Forms, **2015** 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, 2016, you must provide a copy of the 2015 Extension for Filing Request, as approved by the IRS.*

If you are an Independent Contractor or self-employed and have *not* filed your 2015 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), **2015** W-2 Forms, **2015** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2016, you must provide a copy of the 2015 Extension for Filing Request, as approved by the IRS.*

If you receive non-taxable income:

You must submit photocopies of your **2015** YEAR-END (**01/01/15 - 12/31/15**) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student Ioan and/or grant documentation (for PARENT's education), Social Security Income statements, showing the **TOTAL AMOUNT** received in **2015** for ALL members of the household. If you list any total for line 16, you must identify source(s) in Section L.

IF YOU EARNED INCOME OUTSIDE THE US, PROVIDE ALL DOCUMENTATION OF INTERNATIONAL INCOME.

Along with your application, you must include:

	U.S. Individual Inco			lo. 1545-0074 IRS Us		e separate instruct	
Your first name and	initial	Last name			Yo	ur social security nu	mber
If a joint return, spor	use's first name and initial	Last name			Spi	ouse's social security r	number
	ber and street). If you have a P.O.			Apt. no			
Home address (Hum	ber and sireely. If you have a P.O.	DOX, SEE INSTRUCTIONS.		ирс. по	· 🔺	Make sure the SSN(and on line 6c are c	s) abov correct.
City, town or post offic	e, state, and ZIP code. If you have a fr	oreign address, also complete space	s below (see instructions)		Р	residential Election Ca	mpaign
						ck here if you, or your spous y, want \$3 to go to this func	e if filing
Foreign country nan	ie .	Foreign province	e/state/county	Foreign postal co	ide a bo	below will not change you	r tax or
	1 Single		4 П нь				
Filing Status		y (even if only one had incom		ad of household (with q qualifying person is a c			
Check only one		rately. Enter spouse's SSN al		d's name here. ►		,	
DOX.	and full name here			alifying widow(er) with	n depen		
Exemptions		eone can claim you as a depe	endent, do not cheo	k box 6a	· · }	Boxes checked on 6a and 6b	
	b Spouse c Dependents:	(2) Dependent's	(3) Dependent's	(4) ✓ if child under ap	J	No. of children on 6c who:	
	(1) First name Last name	and a second second second second second	relationship to you	qualifying for child tax c (see instructions)	redit	 lived with you did not live with 	_
	.,,	-				you due to divorce or separation (see instructions)	
If more than four dependents, see					_		-
instructions and					_	Dependents on 6c not entered above	-
check here 🕨 🗌	d Total number of exer	notions claimed			_	Add numbers on lines above ►	
Income		, etc. Attach Form(s) W-2			7		
income	8a Taxable interest. Att	ach Schedule B if required			8a		
Attach Form(s)		. Do not include on line 8a			-		
W-2 here. Also		Attach Schedule B if required			9a		-
attach Forms W-2G and		dits, or offsets of state and lo			10		
1099-R if tax was withheld.					11		
was withheld.		(loss). Attach Schedule C or (<u>.</u>	12		
If you did not		Attach Schedule D if require			13		-
get a W-2,	14 Other gains or (losse 15a IRA distributions .	s). Attach Form 4797	b Taxable		14 15b		+
see instructions.	16a Pensions and annuitie		b Taxable		16b		
	17 Rental real estate, ro	yalties, partnerships, S corpo			17		
		a). Attach Schedule F			18		
	19 Unemployment com 20a Social security benefit		b Taxable		19 20b		-
	20a Social security benefit 21 Other income. List ty		D Taxable	amount	206		+
		in the far right column for lines 7	through 21. This is yo	ur total income 🕨	22		
Adiusted	23 Educator expenses		23				
Adjusted Gross		ses of reservists, performing arti					
Income		fficials. Attach Form 2106 or 210 unt deduction. Attach Form 8			-		
		ttach Form 3903			-		
		employment tax. Attach Schedu					
		SIMPLE, and qualified plans	28		-		
		n insurance deduction	29		-		
	30 Penalty on early with 31a Alimony paid b Rec		31a		-		
	32 IRA deduction		318				1
	33 Student loan interest		33				
		ach Form 8917	34		-		1
	35 Domestic production a	ctivities deduction. Attach Forn	8903 35				1
	36 Add lines 23 through				36	1	1

Copies of your 2015 Form 1040, 1040A, or 1040EZ (all pages)

Copies of your 2015 W-2 Forms FROM ALL EMPLOYERS

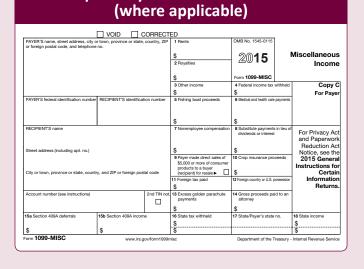
a Employe	ee's social security number	OMB No. 154	5-0008					
b Employer identification number (EIN)				1 Wages, tips, other compensation 2 Federal income tax withh				
c Employer's name, address, and ZIP code			3 So	cial security wages	4 Social security t	ax withheld		
			5 Me	dicare wages and tips	6 Medicare tax wi	ihheld		
			7 So	cial security tips	8 Allocated tips			
d Control number			9		10 Dependent care	benefits		
e Employee's first name and initial Last na	ne	Suff.		nqualified plans	12a			
			13 Stat emp					
			14 Oth	er	12c Good e			
f Employee's address and ZIP code					12d C d e			
15 State Employee's address and ZIP code	16 State wages, tips, etc.	17 State incor	ie tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality nam		
I								
Form W-2 Wage and Tax Statement	2	2015	;	Department	of the Treasury-Internal	Revenue Servi		
Copy 2—To Be Filed With Employee's St Income Tax Return								

Documentation Checklist

- Copies of all pages of your 2015 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 8¹/₂ x 11 paper).
- □ Copies of all required non-taxable income documentation.

Keep a copy of this completed application and all documentation for your records. For more comprehensive instructions, visit <u>www.psas.org/instructions</u>.

Copies of your 2015 1099 Forms



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 **2015** 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 **2015** IRS Form 1040, or you do not file, please see the Required Documentation Section of the instructions.)
- 2015 W-2 and/or 1099 Forms for individual(s) listed in Sections A and B (Please make sure all documentation is copied on regular 8¹/₂ x 11 paper).
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of \$31.00.
 - → Print clearly and neatly with a blue or black ball point pen.
 - Make a photocopy of your completed Student Aid Form and all supporting documentation 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).
 - → Do not send any original documents. Originals cannot be returned.

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

Frequently Asked Questions

My spouse and I recently separated, who should fill out the application and with what information?

The person responsible for tuition should fill out the application. If you and your former spouse filed a joint tax return for the requested tax year then both adults should be included on the application. If both adults resided in the same home for half of the requested tax year then both parents should be included on the application. For example, if the application is requesting **2015** tax information and the couple separated in August **2015**, then both adults will be expected to provide documentation of their income.

I have not filed my tax return. What documents should I provide?

Please provide your last filed tax return and **2015** W-2 Forms. If you filed a Schedule C, E or F on the last filed tax return then you must provide gross and net business estimates in Section K. If you filed a Schedule C, E or F in the previous year's tax year, and do not plan on filing in the requested tax year, please state that in Section L. *Please Note: An IRS extension will be requested for all applications received April 15th and later.*

What is a net and gross business estimate?

Gross business income is the total amount of sales for a tax year. Net business income is the total amount of sales for a tax year minus the operating cost (The net business income is essentially the profit from the business, rental property or farm).

What is a Schedule C, E and F?

- A Schedule C refers to business income or loss.
- A Schedule E refers to rental property, royalties, partnerships, S corporations, trusts, etc.
- A Schedule F refers to *farm income* or loss.

I have children in pre-school and/or college who are not applying for aid. Should I put them on the application? If so, why does it matter?

Please list all dependent children residing in your home who attend a tuition charging school/program. PSAS factors in the amount of children the household has in tuition charging schools.

I live with a significant other who is not responsible for my child's tuition. Should I include their information?

Financial aid considerations are based on total household income. In an effort to maintain consistency PSAS considers all members of the household who are contributing to household living expenses even if they are not legally responsible for tuition.

Why should I provide an email address?

E-mail is used to set up your personal PSAS account ,correspond with PSAS and track your application online at <u>www.my.psas.org</u>. The email address provided is only used by PSAS and the school(s) or agencies contracting with PSAS and will not be provided to any other entity.

For more frequently ask questions please visit <u>www.psas.org</u>. If your inquiry does not match any of the listed FAQ's please email PSAS at info@psas.org or call (440) 892-4272.

Diocesan Financial Assistance Program for Families with Children Attending Catholic Schools

Parish Code List

CODE	PARISH NAME	<u>CITY</u>
01670	St. John Church	Allentown
	St. Peter Claver	
	St. Agnes Church	
	St. Elizabeth Church	
	St. Mary Church	
04700	Sacred Heart Church	Ray Head
04130	St. Barnabas Church	Rayville
	St. Rose Church	
	St. Mary Roman Catholic Church	
	Church of the Ascension	
	St. Francis Church	
	Church of Epiphany	
04000	Church of the Visitation	Brick Town
	St. Dominic Church	
	St. Ann Church	
	St. Katharine Drexel	
	St. Charles Borromeo Church	
	St. Mary Catholic Church	
		COILS NECK
03770	St. Mary of the	Deel
00000	Assumption Church	Deal
	Resurrection Parish	
	Immaculate Conception Church	
03570	St. Dorothea Catholic Church	Eatontown
	Incarnation-Saint James Parish	
03050	Church of the Nativity	Fair Haven
	St. Catherine Church	
	St. Francis and St. Clare Parish	
	St. Pius the Tenth Church	
	St. Robert Bellarmine Church	
	St. Rose of Lima Church	
	Mother of Mercy Church	
	Our Lady Queen of Peace Church	Hainesport
01250	Our Lady of Sorrows- St. Anthony Parish	
	St. Gregory the Great Church	
	St. Raphael-Holy Angels Parish	
	St. Vincent de Paul Church	
	Our Lady of Perpetual Help	
01370	St. Anthony of Padua	Hightstown
	St. Benedict Church	
	St. Catharine Church	
01310	St. Alphonsus Catholic Church	Hopewell
03930	St. Veronica Church	Howell
	St. William the Abbot Church	
	St. Gertrude	
	St. Monica Church	
04230	St. Aloysius Church	Jackson
	St. Andrew	
03350	St. Ann Church	Keansburg
03090	Holy Family Church	Keyport
	Jesus, the Lord Church	
	St. Joseph Catholic Church	
	St. John Church	
	St. Anthony Claret	
04690	St. Mary of the Lake Church	Lakewood
04340	St. Pio of Pietrelcina	Lavallette
01340	Church of St. Ann	Lawrenceville
03710	St. Leo the Great Church	Lincroft

CODE PARISH NAM	E	CITY
03310Christ the King		Long Branch
03910The Parish of St.	Thomas More	Manalanan
03550St. Denis Church		
02360Our Lady of Perp		Manasyuan
U2300Oui Lauy Oi Feip		Maple Shade
03610St. Gabriel Church	·····	Maple Shade
	۲۱ Church	Marlton
02660St. Isaac Jogues	Church	Maritan
02680St. Joan of Arc C		
03530St. Clement Chu		
02800St. Mary of the L	akes Unurch	
03490St. Catherine Ch		
03750St. Mary Catholic		
03695St. Joseph Churc	n	
03070Church of Precio		Monmouth Beach
02320Our Lady of Goo	d	
Counsel Church	-	Moorestown
02120Christ the Redee		
02440Sacred Heart Ch	urch	Mount Holly
02720St. John Neumar		
03110Holy Innocents C		
03290Our Lady of Prov		
04010Church of the As	sumption	New Egypt
01580St. James Churc		
04650St. Martha Churc	h	Point Pleasant
04810St. Peter Church		
01790St. Paul Catholic	Church	Princeton
01430St. David the Kin	g Church	Princeton Junction
03390St. Anthony Chu	ch	Red Bank
03630St. James Catho	lic Church	Red Bank
02920Jesus, the Good	Shepherd	Riverside
02480Sacred Heart Ch	urch [']	Riverton
03030Church of Holy C		
03730St. Mark Catholic		
04160Our Lady of Perp	oetual	
Help Church		Seaside Heights
04370St. Catharine Ch	urch	Seaside Park
03430St. Catharine Ch	urch	Spring Lake
02240Holy Eucharist C		
01490St. George Catho		
04540St. Joseph Churc		
04580St. Justin Church		
04620St. Luke Church.		Toms River
04770St. Maximilian Ko	blbe Church	Toms River
01010Blessed Sacram		
	herd Parish	Trenton
01070Divine Mercy Par		
06965Korean Martyrs		
01640Our Lady of the A		
01280Sacred Heart Ch		
01550St. Hedwig Chur		
01700St. Joseph Catho		
01730St. Mary Catholic		
04880St. Theresa Cath	olic Church	Tuckerton
03370St. Anselm Churc		
03810St. Michael Chur	ch	West End
03650St. Jerome Chur	~h	West Long Branch
01220Our Lady of Goo		WEST LONY DIANUT
	u	West Trenton
04450St. Elizabeth Anr		
02160Corpus Christi C		

Form #092

LIST PARISH CODE IN SECTIONS A and B

Diocesan Financial Assistance Program for Families with Children Attending Catholic Schools

School Code List						
CODE	SCHOOL NAME	<u>CITY</u>				
5825	Our Lady of Mount Carmel	Asbury Park				
5882	Mother Teresa Regional School	Atlantic Highlands				
5827	St. Rose	Belmar				
5888	St. Rose High School	Belmar				
5830	St. Dominic	Brick Town				
5832	St. Paul	Burlington				
5833	St. Charles Borromeo	Cinnaminson				
5835	Holy Cross Academy	Delran				
5836	St. Rose of Lima	Freehold				
5839	St. Benedict	Holmdel				
1956	St. John Vianney High School	Holmdel				
5841	St. Veronica	Howell				
5842	St. Aloysius	Jackson				
5871	Notre Dame High School	Lawrenceville				
5847	St. Leo the Great	Lincroft				
5849	All Saints Catholic Regional	Manahawkin				
5851	Our Lady of Perpetual Help	Maple Shade				
5852	St. Joan of Arc	Marlton				
5853	St. Mary of the Lakes	Medford				
5857	St. Mary	Middletown				
5854	Our Lady of Good Counsel	Moorestown				
5855	Sacred Heart	Mount Holly				
5856	Holy Innocents	Neptune				
5858	St. Peter	Point Pleasant Beach				
5859	St. Paul	Princeton				
1958	Red Bank Catholic High School	Red Bank				
5860	St. James	Red Bank				
5864	Holy Cross School	Rumson				
5865	St. Catharine	Spring Lake				
5881	Donovan Catholic High School	Toms River				
5866	St. Joseph	Toms River				
5876	St. Raphael	Trenton/Hamilton				
5880	Trenton Catholic Academy Lower School	Trenton/Hamilton				
1492	Trenton Catholic Academy Upper School	Trenton/Hamilton				
5875	St. Gregory the Great Academy	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