Student Aid Form 2012 - 2013

PSAS
Private School Aid Service

PARENT NAME

STUDENT NAME

Kennedy Catholic High School
Somers, NY
School Code: 3574
PSAS: 0510 P-R-N-B (9-12)

This form must be postmarked no later than APRIL 16, 2012.

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

Please note: This application requires documentation for income received in 2011.

1. Detailed copies of all pages and Schedules of your **2011** 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(s) 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 **2011** W-2 Wage and Tax Statement Forms, all **2011** 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 8½ x 11 paper - documentation CANNOT be returned).**
3. Documentation of TOTAL AMOUNTS received in **2011** 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 $24.00 **(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 individuals 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 and all documentation for your records.

To check the processing status of your application, go to www.psas.org.

Form #003 (2011)

Save Form | Print Form | Clear Form

Student Aid Form • 2012 - 2013

● IMPORTANT: Print clearly and neatly with a blue or black ball point pen ●

A Parent, Guardian, or Other Adult Responsible for Tuition

Check One: ❍ Father ❍ Mother ❍ Step-Father ❍ Step-Mother ❍ Other Adult

Last Name ____ First Name ____ M.I. ____

Social Security Number ____ Age ____ (____) ____ (Area Code) Home Phone

Address ____ Apartment # (if applicable) ____

City ____ State ____ Zip Code ____

(____) ____ (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, please check and refer to Section K of this form.

B Parent, Guardian, or Other Adult Residing with Parent A

Check One: ❍ Father ❍ Mother ❍ Step-Father ❍ Step-Mother ❍ Other Adult

Last Name ____ First Name ____ M.I. ____

Social Security Number ____ Age ____ (____) ____ (Area Code) Home Phone

Address ____ Apartment # (if applicable) ____

City ____ State ____ Zip Code ____

(____) ____ (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, please check and refer to Section K of this form.

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 2012? ____

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

	Dependent Last Name	Dependent First Name	M.I.	Age	Relation to Parent/ Guardian A	Name of school student plans to attend in the Fall of **2012** **DO NOT ABBREVIATE** / City and State	Grade in the fall of **2012**	Applying for Aid? check one Yes	No	Amount I/We feel I/We can pay toward tuition?	Tuition charged yearly per student?	Office Use Only
1						School Name / City and State		❍	❍			
2						School Name / City and State		❍	❍			
3						School Name / City and State		❍	❍			
4						School Name / City and State		❍	❍			
5						School Name / City and State		❍	❍			

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

D Household Information

1. Number of individuals who will reside in my/our household during the **2012-2013** school year:

   Parents/Guardians ____ Children ____ Other* ____

   *If **Other**, please explain ____

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

E Single, Divorced, Remarried, or Separated Parents (To be completed by the Parent/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 ____ M.I.
4. Do you receive or pay child support? ❑ Receive $ ____ Per year ❑ Pay $ ____ Per year ❑ Neither
5. Who claimed student as a tax dependent in **2011**? ____
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 **2011** 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 2011	Estimate 2012
1. Total number of exemptions claimed on Federal Income Tax form.		
2. Parent/Guardian A total taxable income from W-2 wages. (Total income for Parent A only)	$ ________	$ ________
3. Parent/Guardian B total taxable income from W-2 wages. (Total income for Parent B only)	$ ________	$ ________
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedules C, E, and/or F from your IRS 1040) See 2011 1040 lines 12, 17, and 18	$ ________	$ ________
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2011 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2011 1040A lines 8a-14b	$ ________	$ ________
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 36 or 1040A line 20	$ ________	$ ________
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 37 or 1040A line 21	$ ________	$ ________
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 61 or 1040A line 35	$ ________	$ ________
9a. Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	$ ________	$ ________
9b. Charitable Contributions as reported on Schedule A, line 19 of your IRS 1040 form.	$ ________	$ ________

G Non-Taxable Income

List the **total amount** received from **1/1/11-12/31/11** for all recipients in the household. **DO NOT** list monthly amounts.

10. Child Support $ ________ per year
11. Cash Assistance (TANF) $ ________ per year*
12. Food Stamps and/or W.I.C. $ ________ per year*
    a. Medicaid received in 2011? ❍ Yes ❍ No
13. Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.) $ ________ per year*
    a. Social Security income (SSI Only) Total received in 2011 $ ________* (Provide documentation for all recipients in household.)
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 2011 $ ________*
    b. Total used for household expenses $ ________ per year*
15. Housing Assistance (Sec. 8, HUD, etc.) $ ________ per year*
    a. Religious Housing Assistance (parsonage, manse, etc.) Total received in 2011 $ ________*
16. Other non-taxable income (Working for cash, Adoption and/ or Foster Subsidy, Worker's Comp., Disability, Pension/ Retirement, etc. Identify source(s) in Section L) $ ________ per year*
    a. **Any and all Military/VA Benefits and/or Compensation** Total received in 2011 (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 2011 $ ________ per year

*You must provide 2011 YEAR-END documentation for items 11-16a; either a YEAR-END Statement from the appropriate Public Agency, or documentation showing totals from 1/1/11-12/31/11.

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
    c. Are you current on your monthly payment? ❍ Yes ❍ No
    If No, what was the total amount paid in **2011**? $ ________
22. If you own a 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
    d. Are you current on your monthly payment? ❍ Yes ❍ No
    If No, what was the total amount paid in **2011**? $ ________

I Assets & Investments (Current Values)

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 $ ________
    a. What was your total contribution to your retirement account(s) in **2011** (IRA, Keogh, 401K, SEP, etc.)? $ ________
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. Loss of job
- ❑ b. Recent separation/divorce
- ❑ c. Change in family living status
- ❑ d. Change in work status
- ❑ e. Bankruptcy
- ❑ f. College expenses
- ❑ g. Income reduction
- ❑ h. Illness or injury
- ❑ i. Death in the family
- ❑ j. Shared custody
- ❑ k. High debt
- ❑ l. Child support reduction
- ❑ m. Medical/Dental expenses
- ❑ n. Shared tuition
- ❑ o. Other (explain in Section L)

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

Go to next page

Parent/Guardian A: ______________________________ SS#: ____________________
Print Name

K Business Income Estimate (2011 Totals)

(If you have not filed your 2011 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? (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 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 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 $24.00. *This is a non-refundable application fee.*

3.

If you have filed a 2011 IRS Form 1040:	If you have not yet filed a 2011 IRS Form 1040:	If you do not file an IRS Form 1040 AND receive only non-taxable income:
A complete photocopy of your **2011** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).	A complete photocopy of your most recent Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules). 2011 W-2 Forms, 2011 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the **IRS and a copy of your last filed tax return.***	Photocopies of your **2011** 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 AMOUNTS** received in **2011** 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 my/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 ________ 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 completed application and photocopies of all documentation to:
PRIVATE SCHOOL AID SERVICE, P.O. BOX 89434, CLEVELAND, OH 44101-6434

Questions? Call: (440) 892-4272

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 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 (**2012-2013**); 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.

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 2011, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2011. Be sure to estimate the income in Section F for 2012.

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 **2011** and estimated amounts for **2012**.

ITEM 1: Enter the total number of exemptions you claimed on your **2011** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2011** W-2 forms and/or **2011** 1099 forms from all employers.

ITEM 3: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2011** W-2 forms and/or **2011** 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 **2011**, you must also fill out Section K of this application. *(See **2011** 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 2011.** *(See **2011** 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 **2011** 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 **2011** 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 **2011** 1040 line 61, or 1040A line 35.)*

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).

Detach Here

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

G Non-Taxable Income

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2011** 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 **2011** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for **2011**.

ITEM 12: Food Stamps and/or W.I.C.: Report total amount received for **2011**. Do not combine with TANF or Medicaid.

ITEM 12a: Did you receive Medicaid in **2011**?

ITEM 13: Social Security benefits: Report the total non-taxable (**SSA/SSD, etc.**) amount received in **2011** for all recipients in household.

ITEM 13a: Social Security benefits: Report the total non-taxable (**SSI ONLY**) amount received in **2011** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2011** 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 **2011**.

ITEM 15: Housing assistance: Report the total amount received for **2011**. 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 **2011**.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in **2011** 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 **2011** 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 **2011**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2011** for household expenses.

ITEM 19: Total non-taxable income for 2011: 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 **2011**.

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 **2011**.

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. List total amount contributed in **2011** 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. 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 **2011** 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 **2011** 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 and also include a letter of explanation with this application.

K Business Income

Provide 2011 Business Income Estimates if you have not filed your 2011 Tax Return.

ITEM 1: List estimated total GROSS taxable business income for **2011**.

ITEM 2: List estimated total NET taxable business income/loss for **2011**.

ITEM 3: List the total amount paid by business in **2011** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2011** for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in **2011** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in **2011**.

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 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 2011 IRS Form 1040:

You must submit photocopies of all pages of your **2011** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2011** W-2 Forms, **2011** 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 2011 IRS Form 1040:

You must submit photocopies of all **2011** W-2 Forms, **2011** 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, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you are an Independent Contractor or self-employed and have *not* filed your 2011 IRS Form 1040:

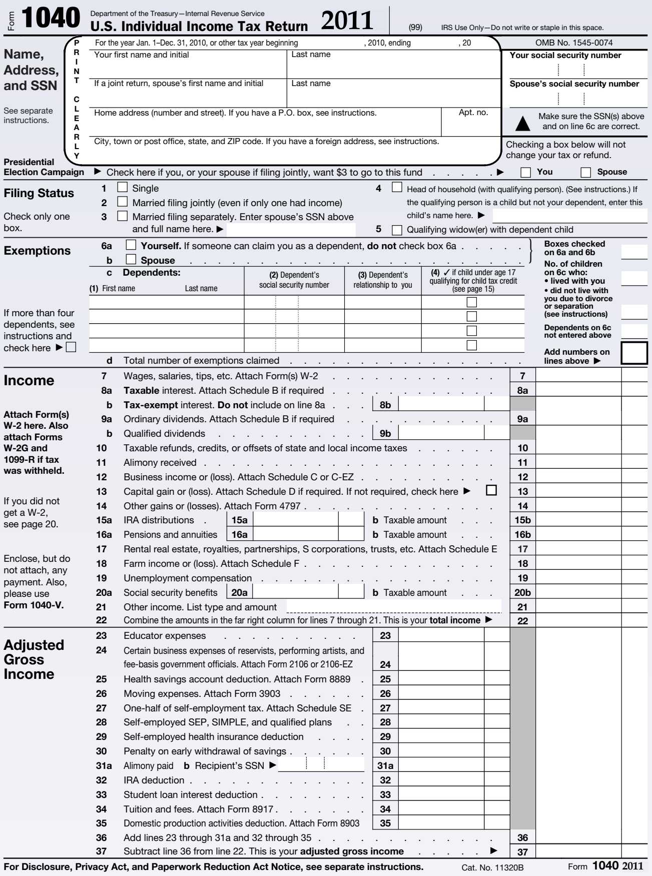
You must complete Section K and submit photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules), **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you receive non-taxable income:

You must submit photocopies of your **2011** YEAR-END (**01/01/11 - 12/31/11**) 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 **2011** 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 2011 Form 1040, 1040A, or 1040EZ (all pages)



Form 1040 Department of the Treasury—Internal Revenue Service U.S. Individual Income Tax Return 2011 (99) IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2010, or other tax year beginning , 2010, ending , 20 OMB No. 1545-0074

Name, Address, and SSN — Your first name and initial; Last name; Your social security number; If a joint return, spouse's first name and initial; Last name; Spouse's social security number; Home address (number and street). If you have a P.O. box, see instructions. Apt. no.; Make sure the SSN(s) above and on line 6c are correct.; City, town or post office, state, and ZIP code. If you have a foreign address, see instructions.; Checking a box below will not change your tax or refund.

Presidential Election Campaign ▶ Check here if you, or your spouse if filing jointly, want $3 to go to this fund ▶ You Spouse

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

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 child under age 17 qualifying for child tax credit (see page 15); d Total number of exemptions claimed. 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 instructions); Dependents on 6c not entered above; Add numbers on lines above ▶

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

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a W-2, see page 20. Enclose, but do not attach, any payment. Also, please use Form 1040-V.

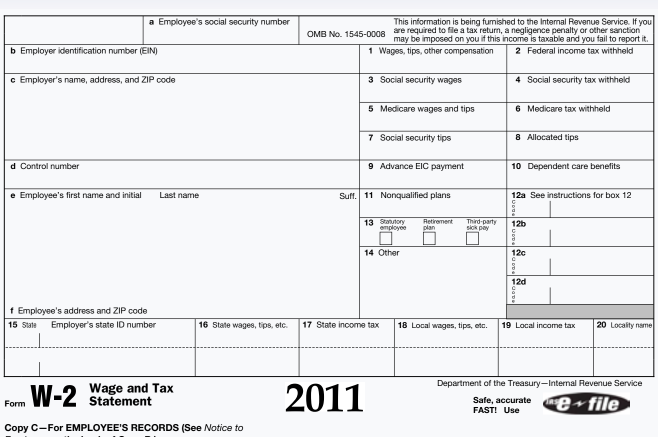
Adjusted Gross Income — 23 Educator expenses; 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ; 25 Health savings account deduction. Attach Form 8889; 26 Moving expenses. Attach Form 3903; 27 One-half of self-employment tax.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

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form 1040 2011

Documentation Checklist

- Copies of all pages of your 2011 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 8½ x 11 paper).
- A check or money order for $24.00 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 cannot return any documentation).
- Copies of all required non-taxable income documentation.
- ***Keep a copy of this completed application and all documentation for your records.***

Copies of your 2011 W-2 Forms FROM ALL EMPLOYERS



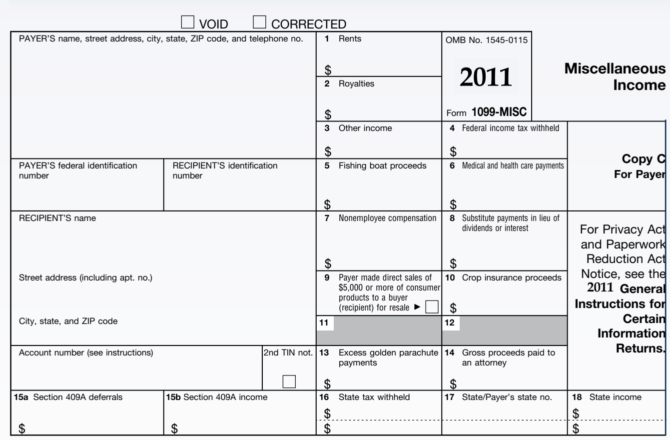
a Employee's social security number; OMB No. 1545-0008; This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.

b Employer identification number (EIN); 1 Wages, tips, other compensation; 2 Federal income tax withheld; c 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; d Control number; 9 Advance EIC payment; 10 Dependent care benefits; e Employee's first name and initial Last name Suff.; 11 Nonqualified plans; 12a See instructions for box 12; 13 Statutory employee Retirement plan Third-party sick pay; 12b; 14 Other; 12c; 12d; f Employee's address and ZIP code; 15 State Employer's state ID number; 16 State wages, tips, etc.; 17 State income tax; 18 Local wages, tips, etc.; 19 Local income tax; 20 Locality name

Form W-2 Wage and Tax Statement 2011 Department of the Treasury—Internal Revenue Service. Safe, accurate FAST! Use e-file

Copy C—For EMPLOYEE'S RECORDS (See *Notice to Employee* on the back of Copy B.)

Copies of your 2011 1099 Forms (where applicable)



VOID CORRECTED

PAYER'S name, street address, city, state, ZIP code, and telephone no.; 1 Rents $; OMB No. 1545-0115; 2011; Form 1099-MISC; 2 Royalties $; Miscellaneous Income; 3 Other income $; 4 Federal income tax withheld $; PAYER'S federal identification number; RECIPIENT'S identification number; 5 Fishing boat proceeds $; 6 Medical and health care payments $; Copy C For Payer; RECIPIENT'S name; 7 Nonemployee compensation $; 8 Substitute payments in lieu of dividends or interest $; Street address (including apt. no.); 9 Payer made direct sales of $5,000 or more of consumer products to a buyer (recipient) for resale ▶; 10 Crop insurance proceeds $; City, state, and ZIP code; 11; 12; Account number (see instructions); 2nd TIN not.; 13 Excess golden parachute payments $; 14 Gross proceeds paid to an attorney $; 15a Section 409A deferrals $; 15b Section 409A income $; 16 State tax withheld $ $; 17 State/Payer's state no.; 18 State income $ $

For Privacy Act and Paperwork Reduction Act Notice, see the 2011 General Instructions for Certain Information Returns.

Form 1099-MISC 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 **2011** 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 **2011** IRS Form 1040, or you do not file, please see the Required Documentation Section of the instructions.)
- **2011** W-2 and/or 1099 Forms for individual(s) listed in Sections A and B **(Please make sure all documentation is copied on regular 8½ x 11 paper)**.
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of $24.00. All returned checks will be subject to an additional $25.00 fee.
  - ✓ 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).
  - ✓ 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 cannot be returned**.

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

Other Common Errors

A & B Parent, Guardian, or Other Adult

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.

C Student Information

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.*

D Household Information

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.

E Single, Divorced, Remarried, or Separated Parents

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

F Taxable Income

Answer Items 1–9b for BOTH **2011** and **2012**. *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.

G Non-Taxable Income

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

H Housing Information

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, c, and d.

I Assets and Investments

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 Items 27 or 28 and are estimating **2011** income, complete Section K of the application. *You must include Schedule C, E and/or Schedule F from your IRS Form 1040.*

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 and also include a letter of explanation with this application.

K Business Income (if estimating **2011** income)

Answer each question that pertains to your estimated income.

L Explanation

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

M Certification, Authorization, and Documentation Requirements

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

Detach Here