Tuition Assistance Application Form • 2008 – 2009

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

A PARENT, GUARDIAN or OTHER ADULT RESIDING WITH STUDENT

Check one: ☐ Father ☐ Mother ☐ Stepfather ☐ Stepmother ☐ Other Adult

Last Name First Name MI

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

Address Development/Apt. #

City State Zip

Occupation/Title/Rank ( ) (Area Code) Work Phone

Employed by How Long? Current monthly salary/Hourly wage

☐ If you are self-employed, check this box and refer to Section K of this form.

E-mail Address

May PSAS contact you at work if there are any questions? ☐ Yes ☐ No

B PARENT, GUARDIAN or OTHER ADULT RESIDING WITH STUDENT

Check one: ☐ Father ☐ Mother ☐ Stepfather ☐ Stepmother ☐ Other Adult

Last Name First Name MI

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

Address Development/Apt. #

City State Zip

Occupation/Title/Rank ( ) (Area Code) Work Phone

Employed by How Long? Current monthly salary/Hourly wage

☐ If you are self-employed, check this box and refer to Section K of this form.

E-mail Address

May PSAS contact you at work if there are any questions? ☐ Yes ☐ No

C DEPENDENTS (DO NOT LEAVE BLANK)

Please list all dependent children in order of oldest to youngest, including college students, whether or not you are requesting tuition assistance for them.

Number of dependent children who will attend a tuition charging school: daycare. Pre-K, elementary school, secondary school or college in the fall of 2008. ___________

	Dependent Last Name	Dependent First Name	MI	Age	Name of school student plans to enter in the fall of 2008 (PLEASE DO NOT ABBREVIATE) / City/State	Grade in the fall of 2008	Applying for Aid? (check one) YES	NO	Amount I/We feel I/We can pay toward tuition	Tuition charged yearly per student	School Code*
1											
2											
3											
4											
5											

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

***Refer to School Code List on front cover**

D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2008-2009 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 **2007**? ______________________
6. Who is responsible for the tuition for the dependent(s) listed in Section C?

If tuition is shared, each responsible party must complete a Tuition Assistance Application Form.

☐ Father ________% Name ______________________

☐ Mother ________% Name ______________________

☐ Other ________% Name ______________________

F TAXABLE INCOME

The **2007** 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 2007	Estimate 2008
1. Total number of exemptions claimed on Federal Income Tax form:	☐	☐
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 **2007** 1040 lines 12, 17 and 18	$ ____________	$ ____________
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See **2007** 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See **2007** 1040A lines 8a-14b	$ ____________	$ ____________
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. See **2007** 1040 line 36 or 1040A line 20	$ ____________	$ ____________
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. See **2007** 1040 line 37 or 1040A line 21	$ ____________	$ ____________
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See **2007** 1040 line 63 or 1040A line 37	$ ____________	$ ____________
9. Medical/dental expenses as reported on Schedule A line 1 of your IRS 1040	$ ____________	$ ____________

G NON-TAXABLE INCOME

List the **total amount** received from 1/1/**07**-12/31/**07** 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*
13. Social Security income (SSI/SSD, etc.) (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 E.)
    a. total received in **2007** $ ____________
    b. total used for household expenses $ ____________ per year*
15. Housing assistance (Sec. 8, HUD, Parsonage, 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 $ ____________ per year
19. **Total non-taxable income for 2007** **$____________ per year**

***You must provide 2007 YEAR-END documentation for items 11-16; either a Year-End Statement from the appropriate Public Agency, or documentation showing totals from 01/01/07 - 12/31/07.**

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 without taxes and insurance? $ ____________ per month

I ASSETS & INVESTMENTS *(AS OF 12/31/**07**)*

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. Identify all the automobiles in the household:

MAKE/MODEL	Year	Market Value	Payment/mo.	Own	Finance	Lease
____________	____	$____________	$__________	☐	☐	☐
____________	____	$____________	$__________	☐	☐	☐
____________	____	$____________	$__________	☐	☐	☐
____________	____	$____________	$__________	☐	☐	☐

27. Do you own any Rental, Time Share or Vacation Properties? ☐ Yes ☐ No
    If Yes, a full description is required in either Section L, or on a separate sheet.
    How many properties?____________ Total Market Value: $____________
28. Do you own any Recreational Vehicles, such as Jet Skis, Motorcycles, Travel Trailer or Motor Home? ☐ Yes ☐ No
    If Yes, a full description is required in either Section L, or on a separate sheet.
    Total Market Value: $____________
29. Do you own a business? ☐ Yes ☐ No
    If **Yes**, please refer to **Section K.**
    a. What is the fair market value of your business? $ ____________
    b. What is the amount still owed? $ ____________
30. Do you own a farm? ☐ Yes ☐ No
    If **Yes**, please refer 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:

- 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

Any box checked in this section requires a full explanation in either Section L, or on a separate sheet.

Form **4506-T**

(Rev. April 2006)

Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

► **Do not sign this form unless all applicable lines have been completed. Read the instructions on page 2.**

► **Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.**

OMB No. 1545-1872

Tip: Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use **Form 4506,** Request for Copy of Tax Return. There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.

1b First social security number on tax return or employer identification number (see instructions)

2a If a joint return, enter spouse's name shown on tax return

2b Second social security number if joint tax return

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code

4 Previous address shown on the last return filed if different from line 3

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

Private School Aid Service / 909 Canterbury Rd. Suite P / Westlake, OH 44145 / ph (440) 892-4272 fax (775) 402-8615

Caution: *If a third party requires you to complete Form 4506-T,* ***do not*** *sign Form 4506-T if lines 6 and 9 are blank.*

6 **Transcript requested.** Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ► 1040

a **Return Transcript,** which includes most of the line items of a tax return as filed with the IRS. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . . ☑

b **Account Transcript,** which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days . ☐

c **Record of Account,** which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days . . . . . ☐

7 **Verification of Nonfiling,** which is proof from the IRS that you **did not** file a return for the year. Most requests will be processed within 10 business days . . . . . ☐

8 **Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript.** The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2003, filed in 2004, will not be available from the IRS until 2005. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days . . ☐

Caution: *If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.*

9 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

12 / 31 / 2007   / /   / /   / /

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, **either** husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer.

Sign Here

Signature (see instructions) — Date: 3/30/2008 — Telephone number of taxpayer on line 1a or 2a ( )

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature — Date: 3/30/2008

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 37667N Form **4506-T** (Rev. 4-2006)

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 Tuition Assistance Application Form, all attachments, and an analysis of your Tuition Assistance Application Form 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 tuition assistance awarded. Recipients and amounts of tuition assistance 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 with whom the child or children reside and the child or children attend a private or independent school contracting with PSAS. If the parents/guardians are divorced or separated, only the parent with legal custody should fill out the form. If tuition is shared, each responsible party must complete a Tuition Assistance Application Form if tuition assistance 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. 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 (2008-2009); 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 2007, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2007. Be sure to estimate the income in Section F for 2008.

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 2007 and estimated amounts for 2008.

ITEM 1: Enter the total number of exemptions you claimed on your **2007** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2007** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2007** W-2 forms and/or **2007** 1099 forms from all employers.

ITEM 3: Enter the total **2007** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2007** W-2 forms and/or **2007** 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 2007, you must also fill out Section K of this application. *(See **2007** 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 2007.** *(See **2007** 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 **2007** 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 **2007** 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 **2007** 1040 line 63 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).

Detach here

PSAS

PRIVATE SCHOOL AID SERVICE

PARENT LAST NAME ____________________

STUDENT LAST NAME ____________________

Diocese of Wilmington Catholic Schools

Including tuition assistance programs from many of the schools listed below.

Tuition Assistance Application Form 2008-2009

Other schools may require additional forms; please check with the individual school offices.

You must return this application to:
Private School Aid Service, P.O. Box 770728, Lakewood, Ohio 44107-0034
no later than ***March 3, 2008***.

Elementary School Codes

Fill in one of these codes next to each student in Section C

Claymont	Holy Rosary	3505
Dover	Holy Cross	1019
Easton	SS. Peter and Paul	3510
Elkton	Immaculate Conception	3507
Glasgow	Christ the Teacher	3529
New Castle	Our Lady of Fatima	3508
	St. Peter	3525
Newark	Holy Angels	3503
Ocean Pines	Most Blessed Sacrament	3530
Perryville	Good Shepherd	3502
Salisbury	St. Francis de Sales	3517
Wilmington	Corpus Christi	3501
	Immaculate Heart of Mary	3528
	St. Ann	1811
	St. Anthony	3512
	St. Catherine	3514
	St. Elizabeth	3515
	St. Helena	3519
	St. John Beloved	3520
	St. Mary Magdalen	3522
	St. Matthew	3523
	St. Paul	3524
	St. Peter Cathedral	3526
	St. Thomas	3527

Secondary School Codes

Easton	SS. Peter and Paul High School	3511
Magnolia	St. Thomas More Preparatory	1706
Wilmington	Padua Academy	3513
	St. Elizabeth High School	3516
	St. Mark's High School	1039

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 **2007** 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 **2007** W-2 Wage and Tax Statement Forms, all **2007** 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 **2007** 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 AND Form 4506-T Request for Transcript (see attached) 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, it will not be considered complete.

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

Keep a copy of this application.

Parent/Guardian A: ______________________________ SS# ______ – ______ – ______

Print Name

K BUSINESS INCOME ESTIMATE (*2007* TOTALS)

*(If you have not filed your **2007** 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 PROCESSED)

1. This application form filled out in its entirety, *SIGNED AND DATED BELOW* by the Parent or Guardian listed in Sections A and B.

2. 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.*

3. A completed, signed IRS Form 4506-T, Request for Transcript of Tax Return.

4.

IF YOU HAVE FILED A 2007 IRS FORM 1040:	IF YOU HAVE NOT YET FILED A 2007 IRS FORM 1040:	IF YOU DO NOT FILE AN IRS FORM 1040 AND RECEIVE ONLY NON-TAXABLE INCOME:
A complete photocopy of your **2007** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2007** W-2 Forms, **2007** 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. **2007** W-2 Forms, **2007** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). **If this application is submitted after April 15, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS and a copy of your last filed tax return.**	Photocopies of your **2007** 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 **2007** 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** __________ **Parent/Guardian B** ______________________________ **Date** __________

This Tuition Assistance Application Form, all attachments and an analysis of your tuition assistance form 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.

PRIVATE SCHOOL AID SERVICE, P.O. Box 770728, Lakewood, Ohio 44107-0034

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:

- A completed, signed IRS Form 4506-T, Request for Transcript of Tax Return.
- Your signature at the bottom of Section M.
- All pages of your **2007** 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 **2007** IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- **2007** 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 Tuition Assistance Application Form for your records.**

✓ Do not staple ANYTHING to the Tuition Assistance Application 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 residing with the student. 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 2007 and 2008. *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 item 27. *You must include Schedule E from your IRS Form 1040.*

If you answered “Yes” to Item 29 or 30 and are estimating 2007 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 circumstance 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 2007 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.

G NON-TAXABLE INCOME

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2007** 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 **2007** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for **2007**.

ITEM 12: Food Stamps: Report total amount received for **2007**. Do not combine with TANF.

ITEM 13: Social Security benefits: Report the total non-taxable amount received in **2007** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2007** 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 **2007**.

ITEM 15: Housing assistance: Report the total amount received for **2007**. Identify in Section L all sources of Housing assistance (parsonage, government assistance, Section 8, HUD, family/friends or other sources), including monies received toward rental/mortgage payments and/or utilities.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in **2007** 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 **2007**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2007** for household expenses.

ITEM 19: Total non-taxable income for 2007: 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 27: Answer Item 27 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 29: If you own a business, check the Yes box and answer Items 29a and 29b. If you have not filed your **2007** tax return, complete Section K of this application.

ITEM 30: If you own a farm, check the Yes box and answer Items 30a and 30b. If you have not filed your **2007** 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 2007 Business Income Estimates if you have not filed your 2007 Tax Return.

ITEM 1: List estimated total GROSS taxable business income for **2007**.

ITEM 2: List estimated total NET taxable business income/loss for **2007**.

ITEM 3: List the total amount paid by business in **2007** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2007** for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in **2007** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in **2007**.

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 considered complete without the appropriate signature(s) and the appropriate documentation.

REQUIRED DOCUMENTATION

If you have filed your 2007 IRS Form 1040:

You must submit photocopies of all pages of your **2007** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2007** W-2 Forms, **2007** 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 2007 IRS Form 1040:

You must submit photocopies of all **2007** W-2 Forms, **2007** 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, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS.***

If you are an Independent Contractor or self-employed and *have not* filed your 2007 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, **2007** W-2 Forms, **2007** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS.***

If you receive non-taxable income:

You must submit photocopies of your **2007** YEAR-END (01/01/**07** - 12/31/**07**) 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 **2007** for **ALL** members of the household. If you list any total for line 16, you must identify source(s) in Section L.

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