St. Vincent High School
P.O. Box 517
849 Keokuk Street
Petaluma Ca 94953
707-763-1032 Fax 707-763-9448

Dear Parents/ Guardians of St. Vincent Students:

To apply for financial aid, you must submit a St. Vincent High School Tuition Aid Application along with a Private School Aid Service (PSAS) form. Both documents must be filled out completely and returned to the school with the following items **on or before January 8, 2007 for incoming freshmen.**

<u>Tax Return Documentation</u>

Send photocopies of all pages of your **2005 Federal Tax Return form 1040** with all schedules and copies of your 2005 W-2 forms and or 2005 1099/1099R and1098 forms. Please **DO NOT** include a copy of your state tax return
If you have not yet filed your 2006 IRS form 1040, if available you must submit photocopies of all 2006 W-2 forms, 2005 1099/1099R and 1098 forms for all wage-earning adults residing with the applicant(s).

<u>OTHER MANDATORY DOCUMENTATION</u>
Separated or divorced parents must provide a copy of the filed Child Support Agreement.

Please refer to the PSAS form for detailed instructions regarding all documentation. Failure to provide all necessary documentation may result in a hold on your application which could remove it from consideration.

<u>Please include a check for $20.00</u> made out to ***"Private School Aid Service***." We will forward your completed form to them for processing. This is the service we use to help us to assess need for each family

You will not be considered for financial aid unless all forms are filled out and submitted **on or before January 8, 2007 for incoming freshmen.**

If financial aid is granted, the following will be required of the student:

1) No serious disciplinary problems
2) 2.5 GPA maintained.
3) Attendance record in good standing
4) Service hours as assigned by the school

<u>Failure to keep your tuition account current may result in the loss of financial aid and the suspension of enrollment.</u>
Financial aid decision letters will be mailed to incoming freshmen with acceptance letters in March 2007.

St. Vincent High School
P.O. Box 517
849 Keokuk Street
Petaluma Ca 94953
707-763-1032 Fax 707-763-9448

St. Vincent High School
Financial Aid

If you receive a financial aid award for the 2007-2008 school year, your St. Vincent High School student will be required to provide some service hours to the school. The hours worked will usually consist of two weeks spent helping in the kitchen during lunch or during break or other duties to be assigned. Failure of your student to fulfill these hours may result in loss of financial aid.

Carrie Griffith coordinates the hours. She will contact your student and instruct them which weeks they will be working and what their duties will be.

If you receive financial aid award, you will be asked to sign a statement accepting the award and agreeing to follow the requirements stated above.

If you have any questions, please feel free to contact me at 707-763-1032 X117.

Regards,

Mary P. Schaefer
Director of Finance

ST. VINCENT de PAUL High School
Financial Aid Application 2007-2008

Please complete all pages of this application and return to St. Vincent de Paul High School on or before January 08, 2007 for Freshmen and March 05, 2007 for returning students .
Please include a separate page if you need additional space.
Mail to: Finance Office: St. Vincent de Paul High School P.O. Box 517 Petaluma, Ca 94953

Student Data: List the SVHS students in your family who are applying for aid:		
Last Name	First Name	Graduating Class (circle)
1		08 09 10 11
2		08 09 10 11
3		08 09 10 11

Parental Data		
Father:___Living___deceased	Last Name	First Name
Street Address	City	Zip
Profession	Employer	
Mother:___Living___deceased	Last Name	First Name
Street Address	City	Zip
Profession	Employer	
Step Father:___Living___deceased	Last Name	First Name
Street Address	City	Zip
Profession	Employer	
Step Mother:___Living___deceased	Last Name	First Name
Street Address	City	Zip
Profession	Employer	

CURRENT INCOME INFORMATION

Monthly Income from all Sources: **2006**

____Father, ___Step-Father, ____Male Guardian household gross monthly income $

____Mother, ___Step-Mother, ____Female Guardian household gross monthly income $

Student gross monthly income $

Monthly Alimony Received $

Monthly Child Support $

Monthly Unemployment (Include documentation)

Monthly Social Security and/or pensions received (Include copy SS Income Statement) $

Contribution from others for Student's education (from whom?_________________) $

Monthly Aid to Families with Dependent Children (AFDC) Received $

Monthly Food Stamps Received $

Other family income: $

Legacy $

Relatives $

Income Property $

Location(s)	Market Value
______________________	$ __________
______________________	$ __________

Worker's Compensation Income	Current Year	$ __________	$
	Previous Year	$ __________	
Social Security Income	Current Year	$ __________	$
	Previous Year	$ __________	

Other Than above: Source:(s) ______________________ $

____

Total Gross Monthly Income: $

FOR APPLICANTS WITH BUSINESS INCOME

Submit all supporting Schedule C's and E's

What is salary or draw $

Moneys expended for personal insurances $

Pension/Retirement contributions $

Estimated personal automobile usage

Operating expense $

Insurance $

Does your Business pay your home mortgage or rent $

Other Company paid personal expenses $

Net worth of Business owned $

Estimated market value of Business owned $

RETIREMENT, BROKERAGE AND OTHER SAVINGS ACCOUNTS (indicate which)

Bank or savings firm	Type of account*	
______________________	______________	$
______________________	______________	$
______________________	______________	$

*pension (SEP, Keogh, other pension), brokerage, savings

Student Name____ Page 3 2007-2008

Family Assets/Debt **Monthly Payments**

Cash on Hand (Checking, Savings)		$	
Stocks, Bonds, Investments (do not include retirement 401k's or IRA's)		$	
If you own your Home:	Current Market Value	$	
	Mortgage Balance(include seconds/home equity)	$	$
	Property Taxes (not included in mortgage payment)	$	$
Residential Rental Property	Current Market Value	$	
	Mortgage Balance(include seconds/home equity)	$	$
	Property Taxes (not included in mortgage payment)	$	$
Commercial Rental Property	Current Market Value	$	
	Mortgage Balance(include seconds/home equity)	$	$
	Property Taxes (not included in mortgage payment)	$	$

Number of Vehicles (Owned/Leased) _______

Make ________________	Model ________________	Loan Balance	$	$
Make ________________	Model ________________	Loan Balance	$	$
Make ________________	Model ________________	Loan Balance	$	$

Credit Card Debt (enter the total balance owed on ALL Credit Cards)	$	$
Student Loans (do not include any loans that are currently being deferred)	$	$
Utilities (gas, electric, water, phone)		$
Auto Insurance Premium		$
Life Insurance		$
Telecommunications (tel/cell phones, internet provider)		$
Homeowner's or Renter's Insurance		$
Alimony/Child Support Payment		$
Medical/Dental Expenses		$
Student Sports Activities (soccer, baseball, softball, swimming gymnastics etc)		$
Total Gross Monthly Expenses		$

SPECIAL CIRCUMSTANCES

Please check all that apply that you feel we should take into consideration when reviewing this application

- ☐ Loss of Job
- ☐ Recent Separation
- ☐ Change in family living status
- ☐ Bankruptcy
- ☐ Income reduction
- ☐ Illness or injury
- ☐ Medical expenses (explain____________)
- ☐ Educational expenses (explain______________)
- ☐ Death in family
- ☐ High debt

Use the space below to describe any special circumstances that you feel we should take into consideration when reviewing this application:

We declare and certify that all the information we have provided in the Financial Aid request is, to the best of our knowledge, accurate and complete.

We understand that the penalty for incomplete or inaccurate reporting, as required in this form, will obligate us to pay full tuition and any fees for the year. In addition, we agree to pay any obligations to St. Vincent High School not covered by financial aid, should it be granted, in a timely fashion as promised in the Tuition Agreement.

Father Print name	Sign Name	Date
Mother Print name	Sign Name	Date
Guardian Print name	Sign Name	Date

PARENT LAST NAME ______

STUDENT LAST NAME ______

PSAS PRIVATE SCHOOL AID SERVICE

Student Aid Form

2007-2008

St. Vincent de Paul High School
Petaluma, CA
School Code: 1199
PSAS: 0130 R-M-N-A (9)

This application is for schools that require early enrollment.
If you apply to schools with a later deadline, you will be required to reapply.

This form must be postmarked no later than January 12, 2007.

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

1. Detailed copies of all pages and Schedules of your 2005 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 E with your tax return for a Partnership or S Corporation, you must provide copies of your Schedule K-1. Also, provide Form 1065 and/or Form 1120S (as applicable). If you are not required to file a tax return, see the REQUIRED DOCUMENTATION section of the INSTRUCTIONS.
2. Copies of all 2005 W-2 Wage and Tax Statement Forms, all 2005 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 2005 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 processing fee of $20.00. **(All returned checks will incur an additional fee of $25.00)**

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

Form #019

To check the processing status of your application, go to www.psas.org.
Keep a copy of this application.

Form #019

STUDENT AID FORM • 2007 – 2008

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

A PARENT, GUARDIAN or OTHER ADULT RESPONSIBLE FOR TUITION

Circle one: Father Mother Stepfather Stepmother Other Adult

Last Name ____ First Name ____ MI ____

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

Address ____ Apt. # ____

City ____ State ____ Zip ____

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

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

E-mail address ____

Employed by ____ How Long? ____ May PSAS contact you at work if there are questions? ☐ Yes ☐ No

B PARENT, GUARDIAN or OTHER ADULT RESIDING WITH PARENT A

Circle one: Father Mother Stepfather Stepmother Other Adult

Last Name ____ First Name ____ MI ____

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

Address ____ Apt. # ____

City ____ State ____ Zip ____

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

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

E-mail address ____

Employed by ____ How Long? ____ May PSAS contact you at work if there are questions? ☐ Yes ☐ No

C HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2007-2008 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. ☐ Divorced/remarried* h. ☐ Other: ____

   c. ☐ Widowed f. ☐ Separated* ____

   *If **Divorced**, **Divorced/remarried**, **Separated or Single**, please complete **Section D**.

D 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 ☐ Pay ☐ Neither
5. Total amount of child support **received** for all children in 2005 by **Parent/Guardian A** and **Parent/Guardian B**. $ ____
6. According to court order, when will child support end? (Month/Year) ____
7. Total amount of child support **paid** for all children in 2005 by **Parent/Guardian A** and **Parent/Guardian B**. $ ____
8. Who is responsible for the tuition for the dependent(s) listed in Section E?

   ☐ Father ____% ☐ Mother ____% ☐ Other ____%*

   *If tuition is shared, each responsible party must complete a Student Aid Form (SAF).
9. Who claimed student as a tax dependent in 2005? ____

E DEPENDENTS

Number of dependent children who will attend a tuition charging school, daycare, Pre-K, elementary school, secondary school, or college in the fall of 2007. ____

Please list all dependent children in order of oldest to youngest, including college students.

	Dependent Last Name	Dependent First Name	MI	Age	Name of school student plans to enter in the fall of 2007 / City/State	Grade in the fall of 2007	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											
2											
3											
4											
5											

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

Form #019

F TAXABLE INCOME

The 2005 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 2005	**Estimate 2006**
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. (*You must complete Section K) *(Attach Schedule C, E, and/or F from your IRS 1040)* See 2005 1040 lines 12, 17 and 18	$ ______	$ ______
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2005 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2005 1040A lines 8a-14b	$ ______	$ ______
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2005 1040 line 36 or 1040A line 20	$ ______	$ ______
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2005 1040 line 37 or 1040A line 21	$ ______	$ ______
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 2005 1040 line 63 or 1040A line 38	$ ______	$ ______
9. Medical/dental expenses as reported on Schedule A of your IRS 1040 Form.	$ ______	$ ______

G NON-TAXABLE INCOME

List the **total amount** received from 1/1/05-12/31/05 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 2005 $ ______ per year*
    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 2005 $ ______ per year**

***You must provide 2005 YEAR-END documentation for items 11-16; either a Year-End Statement from the appropriate Public Agency, or documentation showing totals from 01/01/05 - 12/31/05.**

H HOUSING INFORMATION (DO NOT LEAVE BLANK)

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

I ASSETS & INVESTMENTS *(AS OF 12/31/05)*

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

K BUSINESS INCOME ESTIMATE *(2005 TOTALS)*

(If you have not filed your 2005 Tax Return, and/or are Self-Employed, Own a Business, Farm, Rental Property, S-Corp or Partnership)

	Schedule C	Schedule E
1. What is your total 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?		$______

Go to next page ⇨

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

Print Name

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

M CERTIFICATION, AUTHORIZATION AND DOCUMENTATION CHECKLIST

WHAT WE NEED 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 $20.00. *This is a non-refundable processing fee.***
3.

IF YOU HAVE FILED A 2005 IRS FORM 1040:	IF YOU HAVE NOT YET FILED A 2005 IRS FORM 1040:	IF YOU DO NOT FILE AN IRS FORM 1040 AND RECEIVE ONLY NON-TAXABLE INCOME:
A complete photocopy of your 2005 Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S), 2005 W-2 Forms, 2005 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).	A complete photocopy of your 2004 Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S), 2005 W-2 Forms, 2005 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2006, you must provide a copy of the 2005 Extension for Filing Request, as approved by the IRS.*	Photocopies of your 2005 YEAR-END Social Services statement (TANF, etc.), Food Stamp Documentation, Housing Assistance documentation, Student loans and/or grant documentation, Social Security income statement showing **TOTAL AMOUNT** received in 2005 for **ALL** members of the household.

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 under contract with PSAS, named in Section E.

SIGN HERE ⇨

Parent/Guardian A ______________________ **Date** ________ **Parent/Guardian B** ______________________ **Date** ________

This Student Aid Form (SAF), all attachments and an analysis of your SAF are provided 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

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 OR GUARDIAN

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 E. **Do not leave any questions blank.** If natural parents are divorced, separated or single, answer all questions in Section D. If natural parents are divorced/separated and remarried, list information for custodial parent and new spouse. If either parent answers "self-employed," complete Section K.

CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.

C 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 D.

D 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 D about the non-custodial parent.

ITEM 5: 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.*

If the date of divorce or separation took place in the year 2005, PSAS will still require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2005. Be sure to estimate the income in Section F for 2006.

E 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 and the city or state where the school is located. List the grade your child(ren) will enter next fall (2007-2008), 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 E 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. If neither 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.

F TAXABLE INCOME

List all actual amounts for 2005 and estimated amounts for 2006.

ITEM 1: Enter the total number of exemptions you claimed (or will claim) on your 2005 IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total 2005 taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of 2005 W-2 forms and/or 2005 1099 forms from all employers.

ITEM 3: Enter the total 2005 taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of 2005 W-2 forms and/or 2005 1099 forms from all employers. **(Please make sure all documentation is copied on regular 8 ½ x 11 paper)**

ITEM 4: Enter the total net income from business (attach Schedule C or C-EZ), all rents, royalties, partnerships, S-corporations, estates, trusts, etc. (attach Schedule E, Schedule K-1 and applicable Form 1065 and/or 1120S Returns), and all farm income or loss (attach Schedule F). If you have received income from any of these sources, you must also fill out Section K of this application. *(See 2005 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 2005.** *(See 2005 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 2005 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 2005 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 2005 1040 line 63 or 1040A line 38.)*

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

Detach here

G NON-TAXABLE INCOME

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2005** 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 2005 for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for 2005.

ITEM 12: Food Stamps: Report total amount received for 2005. Do not combine with TANF.

ITEM 13: Social Security benefits: Report the total non-taxable amount received in 2005 for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in 2005 for **PARENT's** education. Do not list loans, grants or scholarships received for dependents in Section E. Identify how much of this income was used for household expenses in 2005.

ITEM 15: Housing assistance: Report the total amount received for 2005. 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 2005 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 2005.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in 2005 for household expenses.

ITEM 19: Total non-taxable income for 2005: Add together Items 10-18.

H HOUSING INFORMATION

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

ITEM 21: 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 22: Check with your lending institution and enter the amount still owed, including second mortgages.

I ASSETS AND INVESTMENTS

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

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

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

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

ITEM 27: If you own a business, check the Yes box and answer Items 27a and 27b. In addition, complete Section K of this application.

ITEM 28: If you own a farm, check the Yes box and answer Items 28a and 28b. In addition, 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 2005 Business Income Estimates for businesses/corporations listed on Schedule C and Schedule E of your 1040 Federal Tax Return

ITEM 1: List total GROSS business taxable income for 2005.

ITEM 2: List total NET business taxable income/loss for 2005.

ITEM 3: List the total amount paid by business in 2005 for home rent or mortgage.

ITEM 4: List the total amount paid by business in 2005 for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in 2005 that do not fall into one of the categories above.

ITEM 6: List total amount of rental income received in 2005.

If providing income estimates for more than one business or corporation (Schedule C and/or Schedule E) please list information for each business/ corporation 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 E. 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 2005 IRS Form 1040:

You must submit photocopies of all pages of your 2005 Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S), 2005 W-2 Forms, 2005 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 2005 IRS Form 1040:

You must submit photocopies of all 2005 W-2 Forms, 2005 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s), and photocopies of all pages of your 2004 Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S). ***If this application is submitted after April 15, 2006, you must provide a copy of the 2005 Extension for Filing Request, as approved by the IRS.***

If you are an Independent Contractor or self-employed and *have not* filed your 2005 IRS Form 1040:

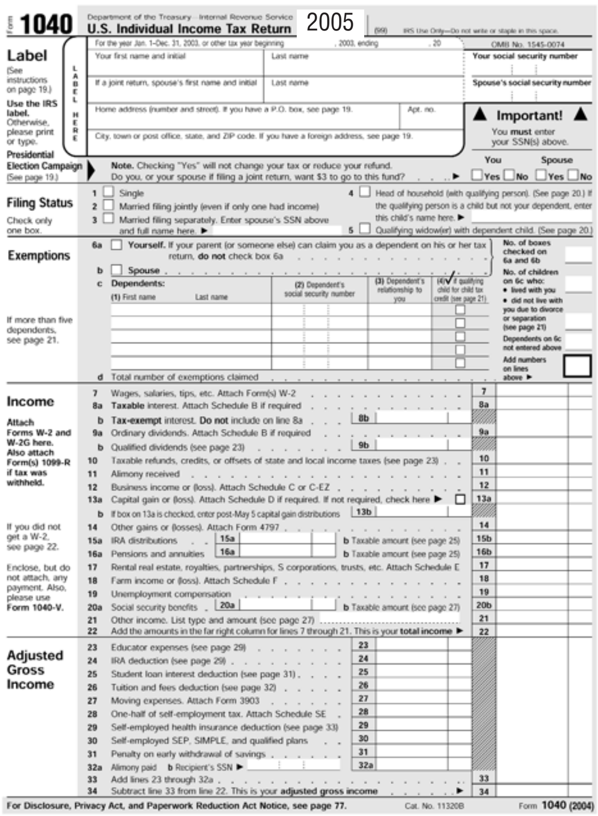
You must complete Section K and submit photocopies of all pages of your 2004 Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S), 2005 W-2 Forms, 2005 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2006, you must provide a copy of the 2005 Extension for Filing Request, as approved by the IRS.***

If you receive non-taxable income:

You must submit photocopies of your 2005 YEAR-END (01/01/05 - 12/31/05) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student loan and/or grant documentation (for PARENT's education), Social Security Income statement, showing the **TOTAL AMOUNT** received in 2005 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 2005 1040, 1040A or 1040EZ form (all pages)



- ✓ Copies of all pages of your 2005 IRS Form 1040, including all Schedules, Form 1120S and/or Form 1065.
- ✓ Copies of *all* W-2 and 1099 forms for individuals listed in Sections A and B.

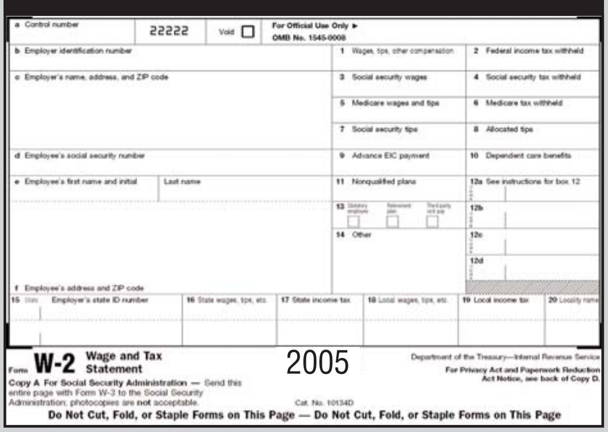
(All documentation should be copied on regular 8 ½ x 11 paper)

- ✓ A check or money order for $20.00 made payable to PRIVATE SCHOOL AID SERVICE.

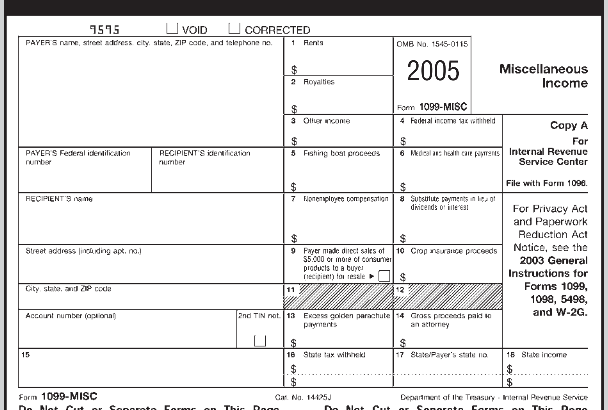
(All returned checks will incur an additional fee of $25.00)

- ✓ A self-addressed stamped postcard or envelope if you require notification that PSAS has received your application (PSAS will not return any documentation).
- ✓ Copies of all required non-taxable income documentation.

Copies of all 2005 W-2 forms FROM ALL EMPLOYERS



Copies of all 2005 1099 forms (where applicable)



If you do not have all of the documentation required:

Contact the IRS for a copy of your 1040, 1040A or 1040EZ, and any Schedules, etc.

Contact your employer for a copy of your W-2. Contact the appropriate contractor 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 2005 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 2005 IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- 2005 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 non-refundable check or money order for $20.00 for the processing of your application. All returned checks will be subject to an additional $25 fee.

✓ Print clearly and neatly with a black or dark ball point pen.

✓ **Make a photocopy of your completed Student Aid Form for your records.**

✓ Do not staple ANYTHING to the Student Aid Form.

✓ Submit the original application only.

✓ Affix proper postage to the envelope (applications without sufficient postage will be returned by the post office).

✓ If you would like to receive notification that PRIVATE SCHOOL AID SERVICE has received your application, enclose a self-addressed stamped postcard or envelope with your application.

✓ Do not send any original documents. Originals will not be returned.

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

OTHER COMMON ERRORS

SECTIONS A & B

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

SECTION C

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 D

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

SECTION E

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 F

Answer Items 1–9 for BOTH 2005 and 2006. *YOU MUST include documentation of all income received by both parents/guardians residing with the applicant(s).* If you are divorced or separated and receive child support, list the yearly amount in Section G Item 10.

SECTION G

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

SECTION H

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

SECTION I

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

If you answered “Yes” to Item 27 or 28 , 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

Answer each question that pertains to your business 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.

Detach here