

YOUR ENCLOSED DOCUMENTS

Please indicate which supporting documents you are enclosing.

Parents' Financial Statement (below)

Schedule C

1040, 1040A or 1040EZ

1099 Forms

W2 Forms

Other Forms

Section A HOUSEHOLD INFORMATION Enter names exactly as they appear on tax/official forms. Questions marked with a (note) require additional explanation in Section F: Notes.

Parent/Guardian A

First Name _____ Last Name _____

Address _____

City _____ State _____ Postal Code _____

DOB _____ Email _____

Phone (home) _____ (cell) _____

Employer _____

Occupation _____ Years with employer _____

If parent/guardian has more than one employer, please explain in Section F: notes.

Parent/Guardian B

First Name _____ Last Name _____

Same Address as Guardian A

Address _____

City _____ State _____ Postal Code _____

DOB _____ Email _____

Phone (home) _____ (cell) _____

Employer _____

Occupation _____ Years with employer _____

If parent/guardian has more than one employer, please explain in Section F: notes.

If the applicant(s) has another living biological parent not listed in Question 1, indicate the relationship between the parents.

Never married Divorced Separated, no court action Legally separated

Is there a joint custody agreement? Yes No Year of divorce/separation _____

Section B STUDENT APPLICATION INFORMATION

APPLICANT A

First Name _____ Last Name _____

Gender Male Female DOB _____

Grade Applicant will enter in 2011 _____

Applicant lives with Parent/Guardian A & B Guardian A Guardian B Other

APPLICANT B

First Name _____ Last Name _____

Gender Male Female DOB _____

Grade Applicant will enter in 2011 _____

Applicant lives with Parent/Guardian A & B Guardian A Guardian B Other

APPLICANT C

First Name _____ Last Name _____

Gender Male Female DOB _____

Grade Applicant will enter in 2011 _____

Applicant lives with Parent/Guardian A & B Guardian A Guardian B Other

Section C FAMILY INCOME

BASIC TAX INFORMATION

6A Have you completed your 2010 Tax Return? Yes No

*Note: It is **not** a requirement that you have completed your 2010 tax return to complete this PFS.*

6B Income tax filing status for 2010: Single Married, joint return Married, filing separately
 Head of household Do not file

6C How many federal income tax exemptions did you or will you claim for 2010? _____

6D What did you or will you report as your total itemized deductions from IRS Schedule A? _____

6E Total Federal Tax Paid (IRS 1040 or 1040A) _____

TOTAL TAXABLE INCOME

7A Salaries and wages for Parent/Guardian A _____

(If you own a business or farm, include only any salary you pay yourself. Report business/farm profit or loss in Question 7I.)

7B Salaries and wages for Parent/Guardian B *(See note above)* _____

7C Taxable dividends and/or interest income from 1099 statement(s) _____

7D Alimony received or estimated *(Do not include child support)* _____

7E Other taxable income, if any *(Describe in Section F: notes)* _____

7F Untaxed portion of payments to IRA _____

7G Keogh plan payments and self-employed SEP deduction _____

7H Other IRS allowable adjustments to taxable income _____

BUSINESS AND/OR FARM DETAILS

Complete this section only if you own a business and/or farm.

7I Net profit/loss from business and/or farm _____

(If loss, use parentheses around figures. Do not use a negative sign.)

7J Owner of the business and/or farm: *(select only one)* Parent/Guardian A and B Parent/Guardian A Parent/Guardian B

7K Type of business and/or farm _____

7L Percentage of Ownership _____

7M Business/Farm Assets _____

7N Business/Farm Debt _____

7O Total depreciation claimed on business and/or rental property assets _____

7P Self-employment tax paid _____

TOTAL NONTAXABLE INCOME

8A Child support received for all children _____

8B Social Security benefits for entire family _____

8C Other nontaxable income *(Complete the worksheet below.)*

Worksheet- other nontaxable income breakdown/detail	2010	Estimated 2011
Payment to tax-deferred pension and savings plans as reported on W-2 form(s). Include amounts withheld from earnings for qualified retirement plans, such as 401(k) and 403(b) plans. Do <i>not</i> report amounts entered in 7F.		
Pretax contribution or employer-provided untaxed income from fringe benefit plans <i>(cafeteria or 125 plans)</i>		
Cash support, gifts, or money paid on your behalf <i>(from relatives or non-relatives)</i>		
Household expenses and any money paid by separated or divorced spouse in lieu of child support		
Housing, food and other living allowances <i>(excluding rent for low-income housing)</i> paid on your behalf or to you as a member of the military, clergy, or other occupation <i>(including cash payments and cash value of benefits)</i> , or contributions to your household income provided by other non-dependent family members.		
Earned income credits, welfare benefits, veterans benefits, workers compensation		
Income from tax-exempt investments		
Income earned abroad <i>(Foreign Income Exclusion, IRS Form 2555 or 2555EZ)</i>		
Other untaxed income and benefits not included above		
Enter the 2010 and estimated 2011 totals	TOTALS	

Section D FAMILY ASSETS AND DEBT

REAL ESTATE

9 Home (if owned) Year Purchased _____
 Purchase Price _____ Present Market Value _____
 Unpaid principal on 1st mortgage _____
 Annual payments on 1st mortgage _____

9B Do you have a second mortgage or home equity loan? Yes No

9C If so, describe the purpose of the second mortgage and/or equity loan in Section F: Notes

9D Unpaid principal on second mortgage/equity loan(s) \$ _____

9E-I

	9E Number of locations	9F Total Purchase Price	9G Present market value	9H Unpaid principal on 1 st mortgage	9I Annual Payments on 1 st mortgage
All other real estate					

10 If you rent your home, provide TOTAL amount you paid in rent for this whole year, and your estimate for next year.

2010 Total \$ _____
 2011 Estimate \$ _____

OTHER ASSETS/DEBTS

13 Bank accounts- total of parents' checking and savings accounts \$ _____

14 Investments- net value (incl. stocks, bonds, mutual funds, etc.) \$ _____

15 Is there an employee retirement plan for: Parent/Guardian A Yes No

Parent/Guardian B Yes No

15B Total value of Parents'/Guardians' IRAs, pensions, and other retirement plans \$ _____

16 Any other debt (Explain in Section F: notes) \$ _____

Section E ADDITIONAL FAMILY INFORMATION

17 How many children are/will be receiving support from you in 2011? _____

17B How many of them will attend tuition-charging childcare centers, schools, or colleges? _____

18 In the chart below, under Educational Expenses, enter the educational expenses you incurred and will incur for ALL of your children- both those applying for financial aid ("Applicant A, B, and C") AND other dependent children. Then, under Payment Sources, enter the dollar amount you will use from each source to pay for these educational expenses. Continue in Section F: notes if necessary)

First/Last Name of Child	Name of childcare provider/school/college	Grade in School/ Yr in College	Cost	Parent/ Guardian	Loan	Student's earnings	Relatives/ other	Financial Aid

19 How much do you *believe* you can afford for educational expenses for the 2011-2012 year for each child you support?

Applicant A _____ Applicant B _____

Applicant C _____ Other dependent children _____

Section F NOTES

Ques. No.	Use this space to provide further explanation for all noted items.
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