

# **Student Aid Form**

PARENT NAME

OFFICE USE ONLY Barcode

St. Edward High School Lakewood, OH School Code: 4303 (SCHL) PSAS: 1224-0908 P-B-N-B (9-12)

\_3\_033\_SCHL\_4303

# Diocese of Cleveland Catholic Schools

To be completed by:

Parents of children in Catholic Elementary Schools and Catholic High Schools: Kindergarten through Grade 12.

Note: If you have already completed a 2014-2015 "Early Application Form" for a Catholic High School, you may not need to complete this application. Please check with the school from which you received this application to determine if this form requiring 2013 income information must be filed.

Parent(s) should complete this Private School Aid Service application. Please send these items to PSAS by March 1, 2014 (Round 1) or by June 1, 2014 (Round 2).

- completed PSAS document,
- your tax documents from **2013** (See "tax year documentation" notes below),
- your \$27.00 check.

This form must be postmarked no later than MARCH 30, 2014.

#### TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

Please note: This application requires documentation for income received in 2013.

- 1. Detailed copies of all pages and Schedules of your 2013 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, F or a statement of dependence, 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 2013 W-2 Wage and Tax Statement Forms, all 2013 1099/1099R for Interest/Dividends, Pensions/Annuities and/or Misc. Income Forms for individuals listed in Sections A and B (Please make sure all documentation is copied on regular 81/2 x 11 paper - documentation CANNOT be returned).
- 3. Documentation of TOTAL AMOUNTS received in 2013 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 \$27.00 (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.

Form #033 (2013)

# STUDENT AID FORM // 2014-2015

IMPORTANT: Print clearly and neatly with a blue or black ball point pen Parent, Guardian, or Other Adult Parent, Guardian, or Other Adult Responsible for Tuition Residing with Parent A Check One: O Father O Mother O Step-Father O Step-Mother O Other Adult Check One: O Father O Mother O Step-Father O Step-Mother O Other Adult Last Name First Name M.I. Last Name First Name (Area Code) Home Phone Social Security Number (Area Code) Home Phone Social Security Number Address Apartment # (if applicable) Address Apartment # (if applicable) City State Zip Code City Zip Code (Area Code) Work Phone (Area Code) Cell Phone (Area Code) Work Phone (Area Code) Cell Phone Employed by How Long? E-mail Address Employed by How Long? E-mail Address Preferred Contact #: O Home O Work O Cell or O E-mail Preferred Contact #: O Home O Work O Cell or O E-mail May PSAS contact you at work if there If you are self-employed, please check May PSAS contact you at work if there O If you are self-employed, please check are questions? • Yes • No and refer to Section K of this form. are questions? • Yes • No and refer to Section K of this form. PARISH CODE (Refer to Parish Code List): PARISH CODE (Refer to Parish Code List): \_ **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 2014? Please list all dependent children in order of oldest to youngest, including college students, even if you are not applying for aid for that student. Note that Diocesan tuition assistance is only given to students in grades K-12. Indicate each dependent's relation to Parent/Guardian A: child, foster child, grandchild, etc. This child has an I NEED Amount I/We feel I/We can Name, city, and state of school student plans to attend in the Fall of 2014. Grade Tuition School Code Ohio Scholarship: e.g. Cleveland/EdChoice/ Relation Dependent Dependent in the fall of charged (Refer to мі to Parent Assistance pay toward yearly per student? Last Name First Name School Birth Guardian A for this child Jon Peterson/Autism DO NOT ABBREVIATE Code List) 2014 tuition? Yes No Yes No 1 O 0 0 0 0 0 O  $\bigcirc$ 0 0 0 0 O 0 0 0 5 O 0 0 0 O Please check if additional dependents are listed on a separate sheet. **Household Information** 1. Number of individuals who will reside in my/our household during the 2014-2015 2. Current marital status/housing arrangement of Parent/Guardian A: school year: O a. Single, never Married\* O d. Divorced\* **Q** g. Residing with Other O b. Married O e. Remarried\* O h. Other: Parents/Guardians \_\_\_\_ \_\_ Children \_\_\_\_ O c. Widowed Of. Separated\* \*If Other, please explain \*If Single, Divorced, Remarried, or Separated, you are required to complete Section 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, First, M.I.) 4. Who claimed student as a tax dependent in 2013? 5. Who is responsible for the tuition for the dependent(s) listed in Section C? Child Support (per year) Names of students Received ☐ Paid Percent of tuition Neither Father Name: father is responsible for paid (per student): \$ \$

Names of students

mother is responsible for:

Paid

\$

Paid

\$

Neither

■ Neither

□ Received

\$ \_\_\_\_ Received

\$

Percent of tuition

paid (per student)

Percent of tuition

paid (per student):

Mother Name:

The <b>2013</b> federal tax return for student's househ	old was:		List the total amount received from 1/1/13-12/31/13 for a	
O Filed	oid was.		DO NOT list monthly amount	
O Not filed yet (See Required Documental			10. Child Support	\$
O I/We do not file. I/We only receive non-tax	cable income - Go t	o Section G	11. Cash Assistance (TANF)	\$
	Actual 2013	Estimate 2014	12. Food Stamps (SNAP)	\$
Total number of exemptions claimed on Federal			a. Medicaid received in 2013? • Yes • No	
Income Tax form.			13. Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)	\$
Parent/Guardian A total taxable income from W-2 wages (Box 1). Total income for Parent A only	\$	\$	a. Social Security income (SSI Only)	Ψ
Parent/Guardian B total taxable income from W-2	Ψ	Ψ	Total received in 2013	\$*
wages (Box 1). Total income for Parent B only	\$	\$	(Provide documentation for all recipients in household	.)
Net business income* from self-employment, farm,			14. Student loans and/or grants received for PARENT's educate	
rentals, and other businesses. (*Go to Section K) (Attach Schedules C, E, and/or F from your IRS			(Not college attending dependents or students listed in Sec	tion C.)
1040) See 2013 1040 lines 12, 17, and 18	\$	\$	a. Total received in 2013	\$*
Other non-work taxable income from interest,			b. Total used for living expenses	\$
dividends, alimony, unemployment, and non-			15. Housing Assistance (Sec. 8, HUD, etc.)	\$
business income. See 2013 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2013 1040A lines 8a-14b	\$	\$	a. Religious Housing Assistance	
Allowable "Adjustments to Income" as reported on	·		(parsonage, manse, etc.) Total received in 2013	s *
your IRS 1040, 1040A, or 1040EZ.			16. Other non-taxable income (Working for cash, Adoption ar	d/
See 2013 1040 line 36 or 1040A line 20	\$	\$	or Foster Subsidy, Worker's Comp., Disability, Pension/	
Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ.			Retirement, etc. Identify source(s) in Section L)	\$
See 2013 1040 line 37 or 1040A line 21	\$	\$	a. Any and all Military/VA Benefits and/or Compensation	
Total Tax Paid as reported on your IRS 1040,			Total received in 2013 (Identify source(s) in Section L)	\$
1040A, or 1040EZ. See 2013 1040 line 61 or 1040A			17. Loans/Gifts from friends or relatives	\$
line 35	\$	\$	18. Personal Savings/Investment Accounts used for household	
Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	\$	\$	expenses (Do not include totals listed in Section I)	\$
c. Charitable Contributions as reported on Schedule	Ψ	Ψ	19. Total non-taxable income for 2013  *You must provide 2013 YEAR-END documentation for items 11-1	\$
A, line 19 of your IRS 1040 form.	\$	\$	from the appropriate Public Agency, or documentation showing	
Housing Information (DO NO	T I FAVE BLA	NK)	Assets & Investments (Current Va	lues)
The state of the s		,	Accessed in section to	14.00)
. Do you rent or own your residence?	O Rent O C	wn (go to line 22)	23. Total amount in cash, checking, and savings accounts	\$
. If renting, what is the monthly rental payment?	\$		24. Total value of money market funds, mutual funds,	\$
a. Amount paid by household	\$	per month	stocks, bonds, CDs, or other securities	\$
		•	25. Total value of IRA, Keogh, 401K, SEP, or other retirement accounts	\$
b. Amount paid by other source(s)	\$	per month	What was your total contribution to your retirement	*
c. Are you current on your monthly payment?	O Yes O N	lo	account(s) in <b>2013</b> (IRA, Keogh, 401K, SEP, etc.)?	
If No, what was the total amount paid in 20	13? \$		26. If you own real estate other than your primary residen	ce:
. If you own a residence:			a. What is the fair market value?	\$
-	_		b. What is the amount still owed?	\$
What is the current market value?	\$		27. Do you own a business? Yes O No	
b. What is the amount still owed, including			If Yes, please go to Section	on K.
home equity loans?	\$		a. What is the fair market value of your business?	\$
c. What is the monthly mortgage payment?	\$	per month	b. What is the amount still owed?	\$
d. Are you current on your monthly payment?	O Yes O N	lo	28. Do you own a farm?	
			If Yes, please go to Section	on K.
If No, what was the total amount paid in 20	13? \$		a. What is the fair market value of your farm?	\$
e. Year home was purchased			b. What is the amount still owed?	\$
Unusual Circumstances (Ch	eck all that app	oly to your situa	ation within the past 12 months)	
D a Loss of job	■ e. Bankrupto	·V	☐ i. Death in the family ☐ m. Me	dical/Dental expense
a. Loss of job	_	-		•
	_			ared tuition
c. Change in family living status	g. Income re	auction	k. High debt	ner (explain in Sectio

☐ I. Child support reduction

■ h. Illness or injury

d. Change in work status

Parent/Guardian A: Print Name		SS	#:	
	nployed Individuals (2013 Esti	mates)		
If you have not filed your 2013 Tax Return, a property, and/or a farm please provide an estable is 1. What is your total estimated GROSS busines 2. What is your total NET business taxable is 3. If your business pays your home rent or modulify the substiness pays for your personal auto 5. If your business pays any portion of other page 6. If you own rental property: What was the total	and are Self-Employed, own a business, restimate of your income - DO NOT LEAVE Ensisted income?  Income/loss? (DO NOT LEAVE BLANK)  Introduced in the second income to the second	ntal  Schedule (  \$  \$  plain in Section L.	\$	- \$ - -
	ollow-up contact with the	. , ,	ding your expla	anations.
	IS REQUIRED TO PROC		ICATION	
	G IS MISSING, YOUR APPLIC		_	OMPLETE.)
1. This application form filled out in its en		• • • • • • • • • • • • • • • • • • • •	• •	
2. A check or money order made payable	to PRIVATE SCHOOL AID SERVICE in	the amount of \$27.00.	This is a non-refundab	le application fee.
Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules).  2013 W-2 Forms, 2013 1099/1099R, or 1098 Forms for any wage-earning	If you have not yet file 2013 IRS Form 1040 A complete photocopy of your most recent Form 1040EZ (as filed with the IRS, with all SN-2 Forms, 2013 1099/1099R, or 1098 Form the searning adult residing with the applicant(s). If it is submitted after April 15, 2014, you must first the 2013 Extension for Filing Request, at the IRS and a copy of your last filed tax received.	rm 1040, 1040A, chedules). 2013 photo as for any wage- this application provide a copy as approved by  Photo state Hous Secu	If you do not of form 1040 AND non-taxable occipies of your 2013 YEA ment (TANF, etc.). Fooding Assistance documenta ant documentation for parity income statements showed in 2013 for ALL members.	receive only income: AR-END Social Services Stamp documentation, tion, Student Loans and/ rent's education, Social wing TOTAL AMOUNTS
An electronic recap of this written appl the electronic recap. Please check this	ication is available for an additional \$5 f s box and include an additional \$5 with y			
Checkout	□ Non-Refundable Application Proce □ Electronic Recap Fee (optional)	-		
SIGN HERE	*Please make checks payable to PSA	S	Total	
I/We declare that the information on this SERVICE to return this form and all attact				PRIVATE SCHOOL AID
Parent/Guardian A	Date Pa	rent/Guardian B		Date
	ashmente and an analysis of your CAE			

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.

#### INTRODUCTION

**PRIVATE SCHOOL AID SERVICE (PSAS)** is under contract with the school, school system, or organization from which you obtained this application for tuition assistance. Our purpose is to provide a reasonable assessment of the ability of each family to pay for the education of their children at private and independent elementary and secondary schools.

Your Student Aid Form, all attachments, and an analysis of your SAF are sent only to the school(s) or agencies contracting with PSAS. No other agency will receive any information about this application or its attachments.

PRIVATE SCHOOL AID SERVICE does not make any decisions about recipients and amounts of financial aid awarded. Recipients and amounts of aid are determined by the designated school or agency. YOU WILL NOT RECEIVE RESULTS FROM PRIVATE SCHOOL AID SERVICE.

#### **INSTRUCTIONS**

#### A & B Parent, Guardian or Other Adult

This form should be filled out by the parent, guardian or other adult responsible for the tuition of the child or children attending a private or independent school contracting with PSAS. If the parents/guardians are divorced or separated, only the parent responsible for the tuition and any other adult residing in the household should fill out the form. If tuition is shared, each responsible party must complete a Student Aid Form (SAF) if financial aid is needed.

Answer *all questions* for both parent(s), stepparent(s), or guardian(s) responsible for tuition for the dependent(s) listed in Section C. **Do not leave any questions blank.** If natural parents are divorced, separated or single, answer all questions in Section E. If natural parents are divorced/separated and remarried, list information for custodial parent and new spouse. If either parent answers "self-employed," and has not filed a tax return, complete Section K. If you provide your email address to PSAS, it will be used for application related communication only. Your email address will also be provided to the organizations you list in Section C as part of your application. Your email address will not be shared with any other third party.

#### CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.

## **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 (2014-2015); 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.

Diocesan Tuition Assistance is awarded to students in grades kindergarten-12.

**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.

#### Household Information

**ITEM 1:** Enter total number of individuals living in the household. Include any college students claimed on the tax return. Do not include children who have moved out of the home. Include all family members dependent on and residing with the parent listed in Section A.

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

#### Single, Divorced, Remarried, or Separated Parents

If dependent(s) parents are divorced or separated, or do not reside in the same household, the custodial parent must provide the information requested in Section E about the non-custodial parent.

If the date of separation took place in the year 2013, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2013. Be sure to estimate the income in Section F for 2014.

**ITEM 5:** Indicate who is responsible for tuition and what percentage for the dependents listed in Section C. List the total amount of child support actually received by custodial parents listed in Sections A & B. List the total amount received and the total amount paid for **2013**.

#### Taxable Income

List all actual amounts for 2013 and estimated amounts for 2014.

**ITEM 1:** Enter the total number of exemptions you claimed on your **2013** IRS Form 1040, 1040A, or 1040EZ.

**ITEM 2:** Enter the total **2013** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2013** W-2 forms and/or **2013** 1099 forms from all employers.

**ITEM 3:** Enter the total **2013** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2013** W-2 forms and/or **2013** 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 **2013**, you must also fill out Section K of this application. (See **2013** 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 2013. (See 2013 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 2013 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 **2013** 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 2013 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).

## **G** Non-Taxable Income

If you receive non-taxable income, you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2013 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 2013 for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for 2013.

**ITEM 12: Food Stamps (SNAP):** Report total amount received for **2013**. Do not combine with TANF or Medicaid.

ITEM 12a: Did you receive Medicaid in 2013?

ITEM 13: Social Security benefits: Report the total non-taxable (SSA/SSD, etc.) amount received in 2013 for all recipients in household.

ITEM 13a: Social Security benefits: Report the total non-taxable (SSI ONLY) amount received in 2013 for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in 2013 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 2013.

**ITEM 15: Housing assistance:** Report the total amount received for **2013**. 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 2013.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in 2013 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 2013 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 2013.

**ITEM 18: Personal Savings/Investment Accounts:** Report the total amount used in **2013** for household expenses.

ITEM 19: Total non-taxable income for 2013: Add together Items 10-18.

# 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 **2013**.

**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 **2013**.

ITEM 22e: Indicate the year your home was purchased.

#### 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 2013 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 2013 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 2013 tax return, complete Section K of this application.

#### **Unusual Circumstances**

Check any and all items that apply to your situation. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying and also include a letter of explanation with this application.

## **Business Income**

Provide 2013 Business Income Estimates if you have not filed your 2013 Tax Return.

ITEM 1: List estimated total GROSS business income for 2013.

ITEM 2: List estimated total NET taxable business income/loss for 2013.

ITEM 3: List the total amount paid by business in 2013 for home rent or mortgage.

 $\textbf{ITEM 4:} \ \ \textbf{List the total amount paid by business in 2013 for personal automobile}.$ 

**ITEM 5:** List the total amount of personal expenses paid by business in **2013** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in 2013.

If providing income estimates for more than one business, corporation or farm (Schedule C, Schedule E and/or Schedule F) please list information for each business, corporation or farm separately. Use additional sheet or Section L, if necessary.

## Explanation

If any specific question requires clarification, write a brief explanation in this space. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying.

# M Certification, Authorization, and Documentation Requirements

You **must** sign the form in this section. Your signature authorizes PSAS to release the form and attachments to the contracting schools indicated in Section C. By signing the form, you also certify that the information submitted is correct. This application CANNOT be processed without the appropriate signature(s) and the appropriate documentation.

#### REQUIRED DOCUMENTATION

#### If you have filed your 2013 IRS Form 1040:

You must submit photocopies of all pages of your **2013** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2013** W-2 Forms, **2013** 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 2013 IRS Form 1040:

You must submit photocopies of all **2013** W-2 Forms, **2013** 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, 2014, you must provide a copy of the 2013 Extension for Filing Request, as approved by the IRS.* 

If you are an Independent Contractor or self-employed and have *not* filed your 2013 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), 2013 W-2 Forms, 2013 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). If this application is submitted after April 15, 2014, you must provide a copy of the 2013 Extension for Filing Request, as approved by the IRS.

#### If you receive non-taxable income:

You must submit photocopies of your 2013 YEAR-END (01/01/13 - 12/31/13) 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 2013 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:

# 1040A, or 1040EZ (all pages) E 1040 Department of the Treasury—Internal Revenue Service (99) U.S. Individual Income Tax Return 2013 OMB No. 1545-0074 IRS UR You Sp Check only one b Spouse c Dependents: instructions and check here d Total number of exemptions claimed . 7 Wages, salaries, tips, etc. Attach Form(s) W-2. 8 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. Income 10 W-2G and 1099-R if tax was withheld. Taxable refunds, credits, or offsets of state and local inco revision destributions 15a b Taxable amount Pensions and annuities 16a b Taxable amount Rental real estate, royalities, partnerships, S corporations, trusts, etc. Attach Sci Farmi Income or Goos), Attach Schedule F. Enclose, but do not attach, any payment. Also, please use Form 1040-V. Unemployment compensation Social security benefits 20a b Taxable amount Other income. List type and amount Combine the amounts in the far right column for lines 7 through 21. This is your to Adjusted Gross fee-basis government officials. Attach Form 2106 or 2106-EZ Health axwings account deduction. Attach Form 8898 Moving expenses. Attach Form 8903 Moving expenses. Attach Form 8903 Moving expenses. Attach Form 8903 Seed-employed relative flower form 1900 Seed Form 1900 Form 8917. Tuition and fees. Attach Form 8917. Tuition and fees. Attach Form 8917.

Copies of your 2013 Form 1040,

#### **Documentation Checklist**

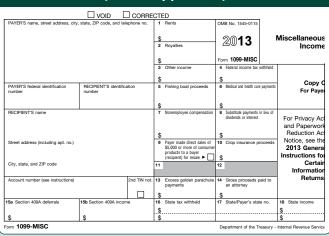
- ☐ Copies of all pages of your **2013** IRS Form 1040, 1040A, or 1040EZ including all Schedules.
- ☐ Copies of *ALL* W-2 and 1099 Forms for individuals listed in Sections A and B (All documentation should be copied on regular 8½ x 11 paper).
- □ A check or money order for \$27.00 made payable to PRIVATE SCHOOL AID SERVICE. (All returned checks will incur an additional fee of \$25.00).
- ☐ Copies of all required non-taxable income documentation.

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

# Copies of your 2013 W-2 Forms FROM ALL EMPLOYERS

	a Employee's social security number OMB No. 154			645-0008					
<b>b</b> Employer identification number (	EIN)	•	1 Was	ges, tips, other compensation	2 Federal income t	ax withheld			
c Employer's name, address, and	ZIP code		3 Soc	cial security wages	4 Social security to	ax withheld			
			5 Me	dicare wages and tips	6 Medicare tax wit	hheld			
			7 Soc	cial security tips	8 Allocated tips				
d Control number			9		10 Dependent care	benefits			
e Employee's first name and initial	Last name	Suff.		nqualified plans	12a				
				loyee plan sick pay	C .				
			14 Oth	er	12c				
					12d				
f Employee's address and ZIP cod		17 State incon	L,		19 Local income tax	1			
15 State Employer's state ID num	ber 16 State wages, tips, etc.	17 State incon	ne tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name			
Wage an Statemen		2013	}	Department of	of the Treasury—Internal	Revenue Service			
Copy 1—For State, City, or Lo	cal Tax Department								

# Copies of your 2013 1099 Forms (where applicable)



# 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 **2013** 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 **2013** IRS Form 1040, or you do not file, please see the Required Documentation Section of the instructions.)
- 2013 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 \$27.00. 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).
  - □ 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. If you provide your email address to PSAS, it will be used for application related communication only. Your email address will also be provided to the organizations you list in Section C as part of your application. Your email address will not be shared with any other third party.

### 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.

### Single, Divorced, Remarried, or Separated Parents

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

#### Taxable Income

Answer Items 1–9b for BOTH **2013** and **2014**. 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.

#### Non-Taxable Income

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

## 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, d and e.

### 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 **2013** income, complete Section K of the application. You must include Schedule C, E and/or Schedule F from your IRS Form 1040.

#### 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 2013 income)

Answer each question that pertains to your estimated income.

# Explanation

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

# Certification, Authorization, and Documentation Requirements

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

# **Parish Code List**

<u>Akron</u>		Cleveland (continued)		<u>Hinckley</u>		Parma (continued)	
Blessed Trinity	4469	St. Boniface		Our Lady of Grace	4494	Holy Family	4659
Immaculate Conception	4467	St. Casimir	4524	<u>Hudson</u>		Holy Spirit Byzantine	4660
Nativity of the Lord Jesus	4473	St. Colman		St. Mary	4495	Pokrova	
St. Anthony of Padua	4459	St. Elizabeth of Hungary	4531	<u>Independence</u>		St. Andrew Ukrainian	4653
St. Bernard-St. Mary		St. Helena Romanian Byzantine	4536	St. Michael	4621	St. Anthony of Padua	4654
St. Francis de Sales		St. Ignatius of Antioch		<u>Kirtland</u>		St. Bridget	
St. Matthew	4471	St. Jerome		Chapel of the Divine Word	4429	St. Charles Borromeo	4656
St. Paul	4475	St. John Cantius		<u>Lakewood</u>		St. Columbkille	4657
St. Sebastian	4477	St. John Nepomucene		St. Clement		St. Francis de Sales	
St. Vincent	4478	St. Leo the Great	4554	St. Gregory the Theologian Byzantine		St. Josaphat Ukrainian	
Visitation of Mary	4458	St. Malachi Parish		St. Luke		Catholic Cathedral	4662
<u>Amherst</u>		St. Mark		Transfiguration	4623	St. Matthias	
St. Joseph	4592	St. Maron		<u>Litchfield</u>	4400	Parma Hts.	
<u>Ashland</u>		St. Mary Byzantine		Our Lady Help of Christians	4496	St. John Bosco	4665
St. Edward	4480	St. Mary (Collinwood)		<u>Lorain</u>	4000	Peninsula	
<u>Avon</u>		St. Mel	4562	Mary Mother of God		Mother of Sorrows	4504
Holy Trinity	4593	St. Michael	4564	Nativity of the Blessed Virgin Mary		Perry	
St. Mary of the		St. Nicholas Croatian Byzantine		Sacred Heart Chapel (Hispanic)		St. Cyprian	4444
Immaculate Conception		St. Patrick (Bridge)		St. Anthony of PaduaSt. Basil Romanian Byzantine		Richfield	
Avon Lake		St. Paul (Croatian)	4577	St. Francis Xavier Cabrini		St. Victor	4505
Holy Spirit	4595	St. Rocco	4583	St. John Ukrainian Byzantine		Rittman	
St. Joseph		St. Stanislaus		St. Joseph		St. Anne	4506
Bainbridge				St. Michael Byzantine		Rocky River	+500
Holy Angels Parish	4400	St. Stephen		St. Nicholas Byzantine			AGGG
Barberton		St. Vincent de Paul		St. Peter	4640	St. Christopher	4000
Holy Trinity	4483	St. Vitus		Loudonville		Shaker Hts.	4445
St. Augustine	4481	Sts. Peter and Paul Ukrainian	45/8	St. Peter	1197	St. Dominic	4445
St. Mary	4484	Cleveland Hts.	4440	<u>Lyndhurst</u>	4431	Sheffield Lake	400=
Bay Village		Communion of Saints	4410	St. Clare	1130	St. Thomas the Apostle	4667
St. Raphael	1507	Columbia Station		Macedonia	4430	Sheffield Village	
Bedford	4331	St. Elizabeth Ann Seton	4610	Our Lady of Guadalupe	1108	St. Teresa of Avila	4668
Our Lady of Hope	4402	Concord Township			4490	<u>Solon</u>	
	4403	St. Gabriel	4435	Madison Immaculate Conception	1121	Resurrection of our Lord	4447
Berea St. Adalbert	4500	<u>Copley</u>			4431	St. John Hungarian Byzantine	4676
St. Adalbert	4598	Guardian Angels	4488	Maple Hts. St. Martin of Tours	4422	St. Mary Ukrainian	4446
St. Mary	4599	<u>Cuyahoga Falls</u>			4432	St. Rita	
<u>Brecksville</u>	4000	Immaculate Heart of Mary	4490	Medina	4500	South Amherst	
St. Basil the Great		St. Eugene		Holy MartyrsSt. Francis Xavier	4400	Nativity of the Blessed Virgin Mary	4669
St. Joseph Byzantine		St. Joseph			4499	South Euclid	
Broadview Hts. Assumption		Dovlestown		Mentor St. Bede the Venerable	1121	Sacred Heart of Jesus	4449
	4602	Sts. Peter and Paul	4492	St. John Vianney		Stow	
<u>Brook Park</u>		Fastlako		St. Mary of the Assumption		Holy Family	4507
Mary Queen of the Apostles	4604	St. Justin Martyr	4414	Mentor-on-the-Lake	4431	Strongsville	1001
<u>Brooklyn</u>		Elyria		St. Andrew the Apostle Byzantine	1138	St. John Neumann	4670
St. Elias Melkite Catholic	4605	St. Agnes	4611	Middleburg Hts.	4430	St. Joseph the Worker	
St. Thomas More	4606	St. Jude		St. Bartholomew	4644	Tallmadge	
<u>Brunswick</u>		St. Mary		Middlefield		Our Lady of Victory	4508
St. Ambrose		St. Vincent de Paul	4616		4439	Thompson	
St. Colette		Euclid	4010	Newbury		St. Patrick	
St. Emilian Byzantine	4609	Our Lady of the Lakes	1/17	St. Helen	4440	Twinsburg	4431
<u>Chagrin Falls</u>		St. John of the Cross		North Olmsted		Sts. Cosmas and Damian	4500
St. Joan of Arc	4406			St. Brendan	4645	University Hts.	4309
<u>Chardon</u>		St. Stephen Byzantine		St. Clarence			4450
St. Mary	4407	Sts. Robert and William	1480	St. Richard		Gesu	4452
<u>Chesterland</u>		<u>Fairlawn</u>	4474	North Ridgeville		Valley City	4540
St. Anselm	4408	Our Lady of the Cedars	4474	St. Julie Billiart	4648	St. Martin of Tours	4510
<u>Cleveland</u>		St. Hilary	4465	St. Peter		<u>Wadsworth</u>	
Blessed Trinity	4519	<u>Fairport Harbor</u>		North Royalton	10 10	Sacred Heart	4511
Cathedral of St. John the Evangelist	4525	St. Anthony of Padua		St. Albert the Great	4650	<u>Wellington</u>	
Community of St. Malachi	4555	St. Michael Byzantine	4422	Northfield		St. Patrick	4672
Holy Ghost Byzantine		<u>Fairview Park</u>		St. Barnabas	4501	<u>West Salem</u>	
Holy Name	4539	St. Angela Merici		Norton	1001	St. Stephen	4512
Holy Redeemer		St. Mary Magdalene Byzantine	4618	St. Andrew the Apostle	4502	<u>Westlake</u>	
Holy Rosary		<u>Garfield Hts</u> .		Oberlin		St. Bernadette	4673
Immaculate Conception		Holy Spirit	4678	Sacred Heart	4651	St. Ladislas	4674
Immaculate Heart of Mary		St. Monica		Olmsted Falls		<u>Wickliffe</u>	
Mary Queen of Peace		St. Therese		St. Mary of the Falls	4652	Our Lady of Mount Carmel	4454
Our Lady of Angels		Sts. Peter and Paul		Orrville		Willoughby	
Our Lady of Lourdes		Gates Mills		St. Agnes	4503	Immaculate Conception	4455
Our Lady of Mt. Carmel (West)		St. Francis of Assisi	4427	Painesville		Willoughby Hills	
Our Lady of Peace	4573	Grafton	1 1/4/	St. Mary	4442	St. Noel	4456
Sagrada Familia		Our Lady Queen of Peace	4677	Parkman	+442	Willowick	+-100
St. Agnes-Our Lady of Fatima		Green		St. Edward/St. Lucy	4443	St. Mary Magdalene	4457
		Queen of Heaven	1103	Parma	4443	Wooster	
St. Aloysius-St. Agatha		Highland Hts.	4433	Cathedral of St. John the		St. Mary of the Immaculate	
St. Andrew Kim			4400		1661		1510
St. Augustine		St. Pascal Baylon	4428	Baptist Byzantine		Conception	4513
* List Parish Code in Se	ections /	A and B of the SAF.			See re	everse for School Codes.	

# School Code List

<u>Akron</u>		Cleveland (continued)		<u>Middleburg Hts</u> .	
Archbishop Hoban High School		St. Leo the Great		Academy of St. Bartholomew	4311
North Akron Catholic Elementary		St. Mark		<u>Newbury</u>	
Our Lady of the Elms High School		St. Martin de Porres High School St. Mary Byzantine		St. Helen	4229
St. Anthony of Padua		St. Rocco		North Olmsted	
St. Francis de Sales		St. Stanislaus			1010
St. Mary School		St. Thomas Aquinas		St. Brendan	4312
St. Matthew		Urban Community School		North Ridgeville	
St. Paul		Villa Angela-St. Joseph High School		St. Peter	4314
St. Sebastian		Villa Montessori		North Royalton	
St. Vincent		West Park Catholic		St. Albert the Great	1215
St. Vincent-St. Mary High School	1537	Cleveland Hts.			4313
<u>Amherst</u>		Beaumont School	1205	<u>Northfield</u>	
St. Joseph	4288	Communion of Saints School	4208	St. Barnabas	1145
<u>Ashland</u>		Concord Township		Olmsted Falls	
St. Edward	4246	St. Gabriel	4226	St. Mary of the Falls	4316
Avon	40-0	<u>Cuyahoga Falls</u>		•	
Holy Trinity		Immaculate Heart of Mary		<u>Parma</u>	
St. Mary of the Immaculate Conception	4289	St. Joseph		Holy Family	4321
Avon Lake	4000	Walsh Jesuit High School	4251	Padua Franciscan High School	1725
St. Joseph	4290	<u>Doylestown</u> Sts. Peter and Paul	1404	St. Anthony of Padua	
<u>Barberton</u>	4500	Sts. Peter and Paul	1494	•	
St. Augustine	1528	Elyria Catholic High School	11/16	St. Bridget	4318
Bay Village	4004	St. Jude		St. Charles Borromeo	4319
St. Raphael	4291	St. Mary		St. Columbkille	1189
Bedford	4004	Euclid	4231		
Holy Spirit Academy	4201	Our Lady of the Lake	4213	St. Francis de Sales	4320
Berea	1/16	St. John of the Cross School		<u>Parma Hts</u> .	
Academy of St. Adalbert		Sts. Robert & William School		Holy Name High School	4324
St. Mary	4292	<u>Fairlawn</u>		Incarnate Word Academy	
Assumption Academy	4202	St. Hilary	4243		7020
Brooklyn	4293	<u>Fairview Park</u>		Rocky River	
St. Thomas More	1201	St. Angela Merici	4299	Magnificat High School	1106
Brunswick	4234	<u>Garfield Hts</u> .		St. Christopher	4327
St. Ambrose	4295	John Paul II Academy		Shaker Hts.	
Chagrin Falls	7200	St. Benedict School			4004
St. Joan of Arc	4202	Trinity High School	4219	St. Dominic	4231
<u>Chardon</u>		Gates Mills Gilmour Academy	1221	<u>Solon</u>	
Notre Dame Elementary	4205	St. Francis of Assisi		St. Rita	4232
Notre Dame-Cathedral Latin High School		Highland Hts.	4220	South Euclid	
St. Mary		St. Pascal Baylon	4331	Sacred Heart of Jesus Academy	1223
Chesterland		<u>Hudson</u>		<u>.</u>	4233
St. Anselm	4207	Seton Catholic School	4332	<u>Stow</u>	
Cleveland		<u>Independence</u>		Holy Family	4250
Archbishop James P. Lyke School	1174	St. Michael	4300	<u>Strongsville</u>	
Benedictine High School		<u>Kirtland</u>		Sts. Joseph and John Interparochial	4329
Cleveland Central Catholic High School		Catholic Montessori	1826		
Holy Name Elementary		<u>Lakewood</u>	4000	<u>University Hts</u> .	
Mary Queen of Peace		Lakewood Catholic Academy		Gesu	4235
Metro Catholic Parish School		St. Edward High School	4303	<u>Wadsworth</u>	
		St. Anthony of Padua	4306	Sacred Heart	4253
Our Lady of Angels		St. Peter		Westlake	
Our Lady of Mt. Carmel (West)		Lyndhurst	4310		,
St. Adalbert		Julie Billiart	1683	St. Bernadette	4330
St. Agatha-St. Aloysius		St. Clare		<u>Wickliffe</u>	
St. Francis		<u>Medina</u>		All Saints of John Vianney	4236
St. Ignatius Elementary		St. Francis Xavier	4249	Mater Dei Academy	
St. Ignatius High School		<u>Mentor</u>			4344
St. Jerome		Lake Catholic High School		<u>Wooster</u>	
St. Joseph Academy		St. Mary of the Assumption		St. Mary of the Immaculate Conception	