



## DOCUMENTATION

1. Checklist of required documentation to submit. Please send copies directly to the school office:
  - A. Most current year of Federal Income Tax Return (form 1040) with all accompanying Schedules
  - B. All W-2 forms
  - C. All 1099 forms
  - D. If you are Self Employed you must include the following if appropriate: Schedule C of form 1040 Schedule 1120 if you are incorporated Schedule 1120Sh if you are a Subchapter S Corporation Form K-1 if you are a shareholder or partner Prior year's Balance Sheet for your business
  - E. If you are divorced or legally separated please submit the appropriate section of your most recent decree, which indicates:
    - Child support
    - Custody arrangements
    - Spousal support
    - Arrangement for educational expenses

It is very helpful to the Committee to understand your obligations. Please submit a list of your monthly income and expenses. If you have irregular income, such as commissions, allocate 1/12 of your annual income to this monthly budget. If you have irregular expenses, such as insurance, property tax payments, or vacation expenses, please allocate 1/12 of the total to this monthly budget. Please use our form on page three.

## 2. Family MONTHLY Budget

It is important for you to have a clear picture of your monthly expenses along with the financial statement you submitted to the School and Student Service for Financial Aid. Please complete the following monthly budget:

### Monthly Income:

Parent #1  
Salary/Net Wages \_\_\_\_\_  
(after taxes)

Parent #2  
Salary/Net Wages \_\_\_\_\_  
(after taxes)

Business/Professional \_\_\_\_\_  
Dividends/Interest \_\_\_\_\_  
Rentals (gross) \_\_\_\_\_  
Spousal Support \_\_\_\_\_  
Child Support \_\_\_\_\_  
Disability \_\_\_\_\_  
Unemployment \_\_\_\_\_  
Social Security \_\_\_\_\_  
Other \_\_\_\_\_  
Total Current \_\_\_\_\_  
Monthly Net Income \_\_\_\_\_  
(after taxes)

### Monthly Expenses:

Mortgage(s) \_\_\_\_\_  
Property Taxes \_\_\_\_\_  
Home Insurance \_\_\_\_\_  
Home Repair & Maintenance \_\_\_\_\_  
Household Supplies \_\_\_\_\_  
Utilities \_\_\_\_\_  
Telephones \_\_\_\_\_  
Rent \_\_\_\_\_  
Renter's Insurance \_\_\_\_\_  
Automobiles:  
Make \_\_\_\_\_ Year \_\_\_\_\_ Lease or owned?  
Make \_\_\_\_\_ Year \_\_\_\_\_ Lease or Owned

Total Auto Payment(s) \_\_\_\_\_  
Auto Insurance \_\_\_\_\_  
Auto Maintenance & Repairs \_\_\_\_\_  
Medical/Dental Insurance \_\_\_\_\_  
Medical & Dental Expenses \_\_\_\_\_  
Life Insurance \_\_\_\_\_  
Groceries \_\_\_\_\_  
Entertainment \_\_\_\_\_  
Clothing \_\_\_\_\_  
Vacations \_\_\_\_\_  
Tuition (current) \_\_\_\_\_  
Tuition – Other children \_\_\_\_\_  
Child Care & Activities (from pg.5) \_\_\_\_\_  
Incidentals \_\_\_\_\_  
Credit Card Payments \_\_\_\_\_  
Other: \_\_\_\_\_  
Other: \_\_\_\_\_

Total Current  
Monthly Expenses \$ \_\_\_\_\_

**DO NOT LEAVE BLANK**

**(Yearly Figure)**

Resources available to cover tuition for the school year:

From parent(s)

\$ \_\_\_\_\_

From relatives and friends

\$ \_\_\_\_\_

From student assets

\$ \_\_\_\_\_

From other sources

\$ \_\_\_\_\_

**Total amount available to pay for tuition for the school year.**

\$ \_\_\_\_\_ (not monthly amount)

**3. Home Refinancing:**

Have you refinanced your home in the past 2 years:

How many times:

Do you have an equity line of credit:

If so, what was the total line of credit: \_\_\_\_\_

What is the current balance: \_\_\_\_\_

What is your home equity: \$ \_\_\_\_\_

as of (date): \_\_\_\_\_

**4. Credit Card Debt**

Please explain, in detail, why you incurred this credit card debt:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**5. Children’s Activities, Care & Education**

Please complete the following if your child (or children) are in day care or participate in other programs. Indicate your MONTHLY expenses for these activities:

- Number of children in family \_\_\_\_\_
- Child’s name, grade, and school currently enrolled. Please indicate if you are receiving any financial assistance for each child.

Child #1 \_\_\_\_\_

Child #2 \_\_\_\_\_

Child #3 \_\_\_\_\_

Total Tuition paid for all children in 2023-2024 \$ \_\_\_\_\_

- Day Care Monthly Cost \$ \_\_\_\_\_
- After School Care/Program Monthly Cost \$ \_\_\_\_\_
- Summer School (cost ÷ 12 months = a Monthly Cost of) \$ \_\_\_\_\_
- Camp (cost ÷ 12 months = a Monthly Cost of) \$ \_\_\_\_\_
- Club Sports Activities Monthly Cost \$ \_\_\_\_\_
- Lessons: Type Monthly Cost \$ \_\_\_\_\_
- Tutoring: For Monthly Cost \$ \_\_\_\_\_
- Other: \_\_\_\_\_

Total Monthly Costs \$ \_\_\_\_\_

**6. Divorced or Separated Families**

If parents are separated or divorced, please describe the financial and custody arrangements for the education of your child:

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**7. Change in Family’s Circumstances**

Fully describe any recent changes in your family’s situation or unusual circumstances that affect your ability to pay tuition:

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Is this an isolated or continuing situation/need?

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**8. Self-Employment**

Are you self-employed?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

If you checked yes, please answer the following questions:

- What percentage of the business do you own? \_\_\_\_\_
- Do you operate your business out of your home? \_\_\_\_\_
- Do any of your family members work in the business? \_\_\_\_\_  
(Please specify) \_\_\_\_\_

**Self-employed individuals must also attach copies of the following forms, as appropriate:**

- \_\_\_\_\_ Schedule C of Form 1040 or Profit and Loss Statement
- \_\_\_\_\_ Schedule 1120 form if your company is incorporated
- \_\_\_\_\_ Schedule 1120Sh if your company is a Subchapter S Corporation
- \_\_\_\_\_ Form K-1 if you are a shareholder or partner (please note: if the partnership has not filed its 2023 K-1 as of this application’s deadline date, please submit the 2022 K-1 and provide an estimate of the 2023 K-1)

**9. Are you the beneficiary of a trust: \_\_\_\_\_ Amount: \_\_\_\_\_**  
**Have you received an inheritance: \_\_\_\_\_ Amount: \_\_\_\_\_**

**10. Do you have any other resources available to your family to help pay the cost of private school tuition; i.e. extended family members. Please give details:** \_\_\_\_\_  
\_\_\_\_\_

**11. Other Comments**

**Please provide any other comments or other information, which would be pertinent to your application: You may attach an additional sheet if needed. \_\_\_\_**  
\_\_\_\_\_  
\_\_\_\_\_

Return this completed form to the school office.