



# PRIVATE SCHOOL AID SERVICE

## Student Aid Form 2008-2009

# Our Faith, Our Children, Our Future School Tuition Organization

S. T. O. Help Desk at 1-866-424-6443

### Application Conditions:

- This Student Aid Form (SAF) is used to determine financial need for the Our Faith, Our Children, Our Future School Tuition Organization.
- Student(s) must live in Iowa for S.T.O. funding.
- Local assistance is open to all students, including those residing outside of Iowa. Please speak with your local school administrator to determine if local tuition assistance is available, in addition to STO assistance.
- Incomplete Applications cannot be processed.

### Directions:

- One application is to be filed per family even if dependents attend more than one school.
- All applications are to be returned to PSAS sealed in the envelope provided.
- If you need assistance completing the application, please contact the S.T.O. helpdesk at 1-866-424-6443.

This form must be postmarked no later than **MARCH 17, 2008**.

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

**Please note the required tax year documentation.**

1. Detailed copies of all pages and Schedules of your **2007** Federal Income Tax Return Form 1040, 1040A or 1040EZ (**as filed with the IRS**) for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. If you file Schedule A, C, E or F, you must provide copies. If you have not yet filed, or are not required to file a tax return, see the REQUIRED DOCUMENTATION section of the INSTRUCTIONS.
2. Copies of all **2007** W-2 Wage and Tax Statement Forms, all **2007** 1099/1099R for Interest/Dividends, Pensions/Annuities and/or Misc. Income Forms for individuals listed in Sections A and B (**Please make sure all documentation is copied on regular 8 1/2 x 11 paper**).
3. Documentation of TOTAL AMOUNTS received in **2007** for all Non-Taxable Income (see Section G for specific requirements).
4. Check or Money Order payable to PRIVATE SCHOOL AID SERVICE for the non-refundable application fee of \$20.00 (**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 Parent(s) or Guardian(s) listed in Sections A and B.
6. Please review pages 5 and 6 for explanations/directions as you complete this form.

**IMPORTANT: STO Scholarships will be awarded on a demonstrated need basis.**

PARENT LAST NAME

STUDENT LAST NAME

# Student Aid Form • 2008 – 2009

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

## A PARENT, GUARDIAN or OTHER ADULT RESPONSIBLE FOR TUITION

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

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

Address \_\_\_\_\_ Apt. # \_\_\_\_\_ COUNTY OF RESIDENCE \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

(Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_

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

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

## B PARENT, GUARDIAN or OTHER ADULT RESIDING WITH PARENT A

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

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

Address \_\_\_\_\_ Apt. # \_\_\_\_\_ COUNTY OF RESIDENCE \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

(Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_

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

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

## C 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 2008. \_\_\_\_\_

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

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

\*Refer to School/System Code List

## D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2008-2009 school year:

Parents/Guardians \_\_\_\_\_ Children \_\_\_\_\_ Other \_\_\_\_\_

\*If Other, please explain relationship to Parent \_\_\_\_\_

2. Current marital status/housing arrangement of Parent/Guardian A:

- a.  Single, never Married\* d.  Divorced\* g.  Residing w/Significant Other  
 b.  Married e.  Remarried\* h.  Other: \_\_\_\_\_  
 c.  Widowed f.  Separated\* \_\_\_\_\_

\*If Divorced, Remarried, Separated or Single, please complete Section E.

## E DIVORCED, SEPARATED OR SINGLE PARENTS (TO BE COMPLETED BY PARENT OR GUARDIAN LISTED IN SECTION A)

1. Date of separation (Month/Year) \_\_\_\_\_

2. Date of divorce (Month/Year) \_\_\_\_\_

3. Non-custodial parent \_\_\_\_\_  
 Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

4. Do you receive or pay child support?  Receive \$ \_\_\_\_\_ per year  
 Pay \$ \_\_\_\_\_ per year  
 Neither

5. Who claimed student as a tax dependent in 2007? \_\_\_\_\_

6. Who is responsible for the tuition for the dependent(s) listed in Section C?

Father \_\_\_\_\_% Name \_\_\_\_\_

Mother \_\_\_\_\_% Name \_\_\_\_\_

Other \_\_\_\_\_% Name \_\_\_\_\_\*

\*If tuition is shared, each responsible party must complete a Student Aid Form (SAF).

# F TAXABLE INCOME

The **2007** federal tax return for student's household was:

- Filed  
 Not filed yet (See **Required Documentation** section)  
 I/we do not file. I/we only receive non-taxable income

	Actual 2007	Estimate 2008
1. Total number of exemptions claimed on Federal Income Tax form:	[ ]	[ ]
2. Parent/Guardian A total taxable income from W-2 wages. <small>(List total income for Parent A only)</small>	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. <small>(List total income for Parent B only)</small>	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. <small>(*go to Section K) (Attach Schedule C, E, and/or F from your IRS 1040) See <b>2007</b> 1040 lines 12, 17 and 18</small>	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. <small>See <b>2007</b> 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See <b>2007</b> 1040A lines 8a-14b</small>	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. <small>See <b>2007</b> 1040 line 36 or 1040A line 20</small>	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. <small>See <b>2007</b> 1040 line 37 or 1040A line 21</small>	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. <small>See <b>2007</b> 1040 line 63 or 1040A line 37</small>	\$ _____	\$ _____
9. Medical/dental expenses as reported on Schedule A line 1 of your IRS 1040	\$ _____	\$ _____

# G NON-TAXABLE INCOME

List the **total amount** received from 1/1/07-12/31/07 for **all** recipients in household.

**DO NOT** list monthly amounts.

10. Child support \$ \_\_\_\_\_ per year  
 11. Cash Assistance (TANF) \$ \_\_\_\_\_ per year\*  
 12. Food Stamps \$ \_\_\_\_\_ per year\*  
 13. Social Security income (SSI/SSD, etc.)  
(Provide documentation for all recipients in household.) \$ \_\_\_\_\_ per year\*  
 14. Student loans and/or grants received for PARENT's education.  
(Not college attending dependents or students listed in Section C.)  
 a. total received in **2007** \$ \_\_\_\_\_  
 b. total used for household expenses \$ \_\_\_\_\_ per year\*  
 15. Housing Assistance (Sec. 8, HUD, Parsonage, etc.) \$ \_\_\_\_\_ per year\*  
 16. Other non-taxable income (Workers' Comp., Disability, Pension/Retirement, etc. Identify source(s) in Section L) \$ \_\_\_\_\_ per year\*  
 17. Loans/Gifts from friends or relatives \$ \_\_\_\_\_ per year  
 18. Personal Savings/Investment Accounts used for household expenses \$ \_\_\_\_\_ per year  
 19. **Total non-taxable income for 2007** \$ \_\_\_\_\_ per year

\*You must provide **2007 YEAR-END** documentation for items 11-16; either a **Year-End Statement from the appropriate Public Agency**, or documentation showing totals from 1/1/07 - 12/31/07.

## OFFICE USE ONLY

STO \_\_\_\_\_ H \_\_\_\_\_ T \_\_\_\_\_

# 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 12/31/07)

23. Total amount in cash, checking, and savings accounts \$ \_\_\_\_\_  
 24. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities \$ \_\_\_\_\_  
 25. Total value of IRA, Keogh, 401K, SEP or other retirement accounts \$ \_\_\_\_\_  
 26. 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 go to **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 go to **Section K**.  
 a. What is the fair market value of your farm? \$ \_\_\_\_\_  
 b. What is the amount still owed? \$ \_\_\_\_\_

# J UNUSUAL CIRCUMSTANCES

Check all that apply to your situation:

- a.  Loss of job  
 b.  Recent separation/divorce  
 c.  Change in family living status  
 d.  Change in work status  
 e.  Bankruptcy  
 f.  College expenses  
 g.  Income reduction  
 h.  Illness or injury  
 i.  Death in the family  
 j.  Shared custody  
 k.  High debt  
 l.  Child support reduction  
 m.  Medical/Dental expenses  
 n.  Shared tuition  
 o.  Other (Explain in Section L)

To complete Sections K, L and M go to the next page ⇨

Parent/Guardian A:

SS#

- -

Print Name



### BUSINESS INCOME ESTIMATE (2007 TOTALS)

(If you have not filed your 2007 Tax Return, and are Self-Employed, Own a Business, Rental Property and/or Farm **DO NOT LEAVE BLANK**)

	Schedule C	Schedule E	Schedule F
1. What is your total estimated GROSS business taxable income?	\$ _____	\$ _____	\$ _____
2. What is your total NET business taxable income/loss?	\$ _____	\$ _____	\$ _____
3. If your business pays your home rent or mortgage, what is the annual total?	\$ _____		
4. If your business pays for your personal automobile, what is the annual total?	\$ _____		
5. If your business pays any portion of other personal expenses, list total amount and explain in SECTION L.	\$ _____		
6. If you own rental property: What was the total amount of Rental Income received?	\$ _____		



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



### CERTIFICATION, AUTHORIZATION AND DOCUMENTATION CHECKLIST

#### WHAT IS NEEDED TO PROCESS THIS APPLICATION

(IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE CONSIDERED COMPLETE)

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 application fee.*

3.

#### IF YOU HAVE FILED A 2007 IRS FORM 1040:

A complete photocopy of your 2007 Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). 2007 W-2 Forms, 2007 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

#### IF YOU HAVE NOT YET FILED A 2007 IRS FORM 1040:

A complete photocopy of your most recent Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules. 2007 W-2 Forms, 2007 1099/1099R, or 1098 Forms) for any wage-earning adult residing with the applicant(s). **If this application is submitted after April 15, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS and a copy of your last filed tax return.**

#### IF YOU DO NOT FILE AN IRS FORM 1040 AND RECEIVE ONLY NON-TAXABLE INCOME:

Photocopies of your 2007 YEAR-END Social Services statement (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student Loans and/or grant documentation for parent's education, Social Security income statements showing **TOTAL AMOUNT** received in 2007 for **ALL** members of the household.

#### SIGN HERE

I/we declare that the information on this form is true, correct, and complete to the best of our knowledge. I/we authorize PRIVATE SCHOOL AID SERVICE to return this form and all attachments only to the schools and agencies named in Section C under contract with PSAS.



Parent/Guardian A \_\_\_\_\_ Date \_\_\_\_\_ Parent/Guardian B \_\_\_\_\_ Date \_\_\_\_\_

This 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.

#### Notice of Program Research

Scholarship funds offered by the Our Faith, Our Children, Our Future STO are made possible through the Educational Opportunities Act of 2006, a State of Iowa tax credit program to encourage donations to our organization. This STO will participate in voluntary research on the program's effectiveness. Consequently, a small number of families will be contacted to participate in a short survey to share their opinions on the program.

You may be contacted for this research project. Your participation is voluntary, but it will be invaluable to ensure that this scholarship program continues to be available and responsive to you and your child's educational needs. If you choose to participate, **your personal information will remain confidential and will not be shared with anyone** other than the research agency approved by the STO. The research agency will only use the information to compile an overall statistical report on the program. If you desire to be excluded from participation in this research, please check the box below and you will be removed from the list of potential participants for the 2008-09 school year program research. This decision will not affect your scholarship in any way.

Please remove me from the list of potential participants.

## 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.

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

### **C** STUDENT INFORMATION

List all dependent children residing in your household in order of oldest to youngest. If your dependents will be enrolled in any tuition charging school or agency next fall (including daycare, preschool, elementary school, high school, college, or trade school), list the name of the school, city and state where the school is located. List the grade your child(ren) will enter next fall (2008-2009); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

PSAS will consider all students listed in Section C with a check in the "Yes" box for tuition assistance at any school or agency under contract with PSAS. If the "No" box is checked, that student will not be considered. For all additional dependents, use a separate sheet.

**NOTE:** The information regarding tuition charged per student assists PSAS in making the most equitable analysis of your ability to pay for private education. If you are unsure, please estimate.

### **D** HOUSEHOLD INFORMATION

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

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

### **E** DIVORCED, SEPARATED OR SINGLE PARENTS

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

**If the date of separation took place in the year 2007, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2007. Be sure to estimate the income in Section F for 2008.**

**ITEM 4:** List the total amount of child support actually received by custodial parents listed in Sections A & B. *If total received differs from court ordered amount, list only the total received.*

**ITEM 6:** Indicate who is responsible for tuition and what percentage for the dependents listed in Section C.

### **F** TAXABLE INCOME

List all actual amounts for 2007 and estimated amounts for 2008.

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

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

**ITEM 3:** Enter the total 2007 taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of 2007 W-2 forms and/or 2007 1099 forms from all employers.

**ITEM 4:** Enter the total net income from business (attach Schedule C or C-EZ), all rents, royalties, partnerships (attach Schedule E), and all farm income or loss (attach Schedule F). If you have received income from any of these sources and are estimating your income for 2007, you must also fill out Section K of this application. *(See 2007 1040 lines 12, 17 and 18, enter sum total.)*

**ITEM 5:** Enter the total of all other taxable income from interest, dividend income (attach Schedule B if over \$400), taxable refunds, credits or offsets of state and local income taxes, alimony received, capital gain or loss (attach Schedule D). List all capital gain distributions not previously reported, total IRA distributions (if rolled-over, explain in Section L), pensions and annuities, unemployment compensation, taxable social security benefits, and any other taxable income. **Attach copies of all Form 1099/1099R, and/or Form 1098 for Interest/Dividends, Pensions/Annuities or other misc. income. Attach copies of Social Security Income statements and Unemployment Compensation documentation for year-end 2007.** *(See 2007 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 or 1040A lines 8a-14b, enter sum total.)*

**ITEM 6:** Enter allowable adjustments to income, such as IRA payments, self-employment tax, self-employed health insurance deduction, Keogh retirement plan and self-employed SEP deductions, penalty on early savings withdrawals, and alimony paid. Add together to arrive at your total adjustments. **DO NOT** include your standard deduction or deduction amounts for each family member. *(See 2007 1040 line 36 or 1040A line 20.)*

**ITEM 7:** Enter total adjusted gross income as reported on your IRS Form 1040, 1040A or 1040EZ. Attach all pages of the applicable tax form (1040, 1040A, 1040EZ) for documentation. *(See 2007 1040 line 37 or 1040A line 21.)*

**ITEM 8:** Enter the Total Tax paid (not withheld) as reported on your IRS Form 1040, 1040A, or 1040EZ. *(See 2007 1040 line 63 or 1040A line 37.)*

**ITEM 9:** Enter the total of any medical and dental expenses reported on Schedule A line 1 of your IRS Form 1040 (attach Schedule A).

## **G** NON-TAXABLE INCOME

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2007** for all recipients in the household for the following: Cash Assistance (TANF), Food Stamps, Social Security income, Student loans and/or grants (received for PARENT's education), Housing Assistance (Section 8, HUD, etc.), Worker's Compensation, Disability or Retirement.

**ITEM 10: Child support:** Report total amount received for **2007** for all children in the household.

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

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

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

**ITEM 14: Student loans and/or grants:** Report the total amount received in **2007** for **PARENT'S** education. Do not list loans, grants or scholarships received for dependents in Section C. Identify how much of this income was used for household expenses in **2007**.

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

**ITEM 16: Other non-taxable income:** Report all additional non-taxable income received in **2007** including: Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.); food and other living allowances paid to members of the military, clergy or others; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); or any other untaxed benefit or income not subject to taxation by any government (Refugee Assistance, VA Educational Work-Study, etc.). Identify source(s) in Section L.

**ITEM 17: Loans/Gifts received from friends or relatives:** Report the total amount received in **2007**.

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

**ITEM 19: Total non-taxable income for 2007:** Add together Items 10-18.

## **H** HOUSING INFORMATION

**ITEM 20 and 21:** If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

**ITEM 22a:** Determine the present value of the family home and list it. Local real estate agents should be able to help you if you are unsure.

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

## **I** ASSETS AND INVESTMENTS

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

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

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

**ITEM 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 **2007** 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 **2007** tax return, complete Section K of this application.

## **J** UNUSUAL CIRCUMSTANCES

Check any and all items that apply to your situation. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

## **K** BUSINESS INCOME

**Provide 2007 Business Income Estimates if you have not filed your 2007 Tax Return.**

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

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

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

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

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

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

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

## **L** EXPLANATION

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

## **M** PARENTS' CERTIFICATION, AUTHORIZATION, AND DOCUMENTATION CHECKLIST

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

### REQUIRED DOCUMENTATION

#### **If you have filed your 2007 IRS Form 1040:**

You must submit photocopies of all pages of your **2007** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2007** W-2 Forms, **2007** 1099/1099R, or 1098 Forms) for any wage-earning adult residing with the applicant(s). *Do not include your State tax return unless requested.*

#### **If you have not filed your 2007 IRS Form 1040:**

You must submit photocopies of all **2007** W-2 Forms, **2007** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s), and photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules). *If this application is submitted after April 15, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS.*

#### **If you are an Independent Contractor or self-employed and have not filed your 2007 IRS Form 1040:**

You must complete Section K and submit photocopies of all pages of your most recent Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2007** W-2 Forms, **2007** 1099/1099R, or 1098 Forms) for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2008, you must provide a copy of the 2007 Extension for Filing Request, as approved by the IRS.*

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

You must submit photocopies of your **2007** YEAR-END (01/01/07 - 12/31/07) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student loan and/or grant documentation (for PARENT's education), Social Security Income statements, showing the **TOTAL AMOUNT** received in **2007** for **ALL** members of the household. If you list any total for line 16, you must identify source(s) in Section L.

# Our Faith, Our Children, Our Future Student Tuition Organization

## ***SCHOOL CODE/SYSTEM CODE LIST***

<b><u>City (Main Office)</u></b>	<b><u>School Name</u></b>	<b><u>Grades</u></b>	<b><u>Code</u></b>
Ames.....	St. Cecilia School.....	K-5.....	3261
Anamosa.....	St. Patrick School.....	K-6.....	3214
Bellevue.....	Marquette System.....	K-12.....	3262
Calmar.....	C/F/S Consolidated School.....	K-8.....	3460
Cascade.....	Aquin Elementary School.....	K-8.....	3461
Cedar Falls.....	St. Patrick School.....	K-8.....	1667
Cedar Rapids.....	All Saints School.....	K-5.....	1813
Cedar Rapids.....	Holy Family System.....	K-8.....	1143
Cedar Rapids.....	Regis Middle School.....	6-8.....	3265
Cedar Rapids.....	St. Matthew School.....	K-5.....	3267
Cedar Rapids.....	St. Pius X/St. Elizabeth Ann Seton School...	K-5.....	3465
Cedar Rapids.....	Xavier High School.....	9-12.....	1407
Charles City.....	Immaculate Conception School.....	K-6.....	3466
Cresco.....	Notre Dame Elementary School.....	K-6.....	3216
Decorah.....	St. Benedict School.....	K-8.....	4602
Dubuque.....	Holy Family Catholic Schools.....	K-12.....	3467
Dyersville.....	Beckman High School.....	7-12.....	3244
Dyersville.....	St. Francis Xavier School.....	K-6.....	3245
Farley.....	Seton Catholic System.....	K-8.....	3471
Gilbertville.....	Bosco System.....	K-12.....	3268
Guttenberg.....	St. Mary School.....	K-8.....	3247
Holy Cross.....	LaSalle Catholic School.....	K-8.....	3472
Independence.....	St. John School.....	K-8.....	3270
Jesup.....	St. Athanasius School.....	K-8.....	3473
Manchester.....	St. Mary School.....	K-6.....	3248
Maquoketa.....	Sacred Heart School.....	K-12.....	3250
Marion.....	St. Joseph School.....	K-8.....	3271
Marshalltown.....	Marshalltown Area Catholic School.....	K-6.....	3474
Mason City.....	Newman Catholic System.....	K-12.....	1298
Monticello.....	Sacred Heart School.....	K-6.....	3251
New Hampton.....	St. Joseph School.....	K-8.....	3475
New Vienna.....	Hennessy School.....	K-6.....	3252
Oelwein.....	Sacred Heart School.....	K-6.....	3273
Osage.....	Sacred Heart School.....	K-6.....	3476
Ossian.....	St. Francis DeSales School.....	K-8.....	3274
Protivin.....	Trinity Catholic School.....	K-6.....	3275
Waterloo.....	Waterloo Cedar Valley School System.....	K-12.....	1086
Waukon.....	St. Patrick School.....	K-6.....	3276
Waverly.....	St. Paul School.....	K-6.....	3478
Webster City.....	St. Thomas Aquinas School.....	K-6.....	3277
Worthington.....	St. Paul School.....	K-6.....	3278

List School Code in Section C

# 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 **2007** IRS Form 1040, 1040A, or 1040EZ (federal income tax return). **Do not send your state tax return, recap or tax summary.** (If you have not yet filed your **2007** IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- **2007** W-2 and/or 1099 forms for individual(s) listed in Sections A and B (**Please make sure all documentation is copied on regular 8 ½ x 11 paper**).
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of \$20.00. All returned checks will be subject to an additional \$25.00 fee.
  - ✓ Print clearly and neatly with a black or dark ball point pen.
  - ✓ **Make a photocopy of your completed 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 APPLICATION 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 refer to Section K.

### SECTION C

List all dependent children, including college students, in order of oldest to youngest. *If any dependents will attend a tuition charging school next fall, fill in all columns for those children.*

### SECTION D

This section should include the total number of parents, children and other individuals residing in the household. Any household member listed as "Other" should be identified, using Section L if necessary for explanation.

### SECTION E

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

### SECTION F

Answer Items 1–9 for BOTH 2007 and 2008. **YOU MUST include documentation of all income received by both parents/guardians residing with the applicant(s).** If you are divorced or separated and receive child support, list the yearly amount in Section G Item 10.

### SECTION G

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

### SECTION H

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

### SECTION I

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

If you answered "Yes" to Item 27 or 28 and are estimating 2007 income, complete Section K of the application. *You must include Schedule C, E and/or Schedule F from your IRS Form 1040.*

### SECTION J

Check boxes for any unusual or relevant circumstances which affect the applicant. If you feel that your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

### SECTION K (If estimating 2007 income)

Answer each question that pertains to your estimated income.

### SECTION L

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

### SECTION M

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