

Student Aid Form

2009-2010

Diocese of Cleveland Catholic Schools

Place School Label Here

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 2009-2010 "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 2008 income information must be filed.

Parent(s) should complete this Private School Aid Service application.

Please send these items to PSAS by **March 1, 2009** (Round 1) or by **June 1, 2009** (Round 2).

- completed PSAS document,
- your tax documents from 2008 (See "tax year documentation" notes below),
- your \$21.00 check.

Please check off the information that pertains to your family:

- My child(ren) has/have a voucher from the Cleveland Scholarship and Tutoring Program.
Number of children with Cleveland Scholarships? _____
- My child(ren) has/have an Ohio EdChoice Scholarship. Number of children with Ohio EdChoice Scholarships? _____

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 **2008** 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 **2008** W-2 Wage and Tax Statement Forms, all **2008** 1099/1099R for Interest/Dividends, Pensions/Annuities and/or Misc. Income Forms for individuals listed in Sections A and B (**Please make sure all documentation is copied on regular 8 ½ x 11 paper**).
3. Documentation of TOTAL AMOUNTS received in **2008** 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 \$21.00 (**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.

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

Keep a copy of this completed application for your records.

Student Aid Form • 2009 – 2010

• 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. # _____ PARISH CODE (see list) _____
 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. # _____ PARISH CODE (see list) _____
 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 (DO NOT LEAVE BLANK)

List dependent children in your family who will attend a tuition charging school: day care, Pre-K, elementary school, secondary school, or college in the fall of 2009.

Note that Diocesan Tuition Assistance is only given to students in grades K-12.

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 2009 (PLEASE DO NOT ABBREVIATE)		Grade in the fall of 2009	Applying for Aid? (check one)		Amount I/We feel I/We can pay toward tuition	Tuition charged yearly per student	School Code*
					City/State			YES	NO			
1					School Name:							
					City/State:							
2					School Name:							
					City/State:							
3					School Name:							
					City/State:							
4					School Name:							
					City/State:							
5					School Name:							
					City/State:							

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

*Refer to School Code List

D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2009-2010 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 2008? _____

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 2008 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 2008	Estimate 2009
1. Total number of exemptions claimed on Federal Income Tax form:	<input type="text"/>	<input type="text"/>
2. Parent/Guardian A total taxable income from W-2 wages. (List total income for Parent A only)	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (List total income for Parent B only)	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedule C, E, and/or F from your IRS 1040) See 2008 1040 lines 12, 17 and 18	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2008 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2008 1040A lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 36 or 1040A line 20	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 37 or 1040A line 21	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 2008 1040 line 61 or 1040A line 37	\$ _____	\$ _____
9. Medical/dental expenses as reported on Schedule A line 1 of your IRS 1040 Form.	\$ _____	\$ _____

G NON-TAXABLE INCOME

List the **total amount** received from 1/1/08-12/31/08 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 2008 \$ _____
- 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 (Do not include totals listed in Section I) \$ _____ per year
19. **Total non-taxable income for 2008** \$ _____ per year

*You must provide 2008 YEAR-END documentation for items 11-16; either a Year-End Statement from the appropriate Public Agency, or documentation showing totals from 1/1/08 - 12/31/08.

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 12/31/08)

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 in the past 12 months:

- 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)

Go to next page ⇒

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. If the child qualifies for assistance, only one grant will be awarded.

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 (2009-2010); 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.

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.

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 2008, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2008. Be sure to estimate the income in Section F for 2009.

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 2008 and estimated amounts for 2009.

ITEM 1: Enter the total number of exemptions you claimed on your **2008** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2008** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2008** W-2 forms and/or **2008** 1099 forms from all employers.

ITEM 3: Enter the total **2008** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2008** W-2 forms and/or **2008** 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 2008, you must also fill out Section K of this application. *(See 2008 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 2008.** *(See 2008 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 2008 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 2008 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 2008 1040 line 61 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 2008** 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 **2008** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for **2008**.

ITEM 12: Food Stamps: Report total amount received for **2008**. Do not combine with TANF.

ITEM 13: Social Security benefits: Report the total non-taxable amount received in **2008** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2008** 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 **2008**.

ITEM 15: Housing Assistance: Report the total amount received for **2008**. 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 **2008** 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 **2008**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2008** for household expenses.

ITEM 19: Total non-taxable income for 2008: 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 **2008** 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 **2008** 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 2008 Business Income Estimates if you have not filed your 2008 Tax Return.

ITEM 1: List estimated total GROSS taxable business income for **2008**.

ITEM 2: List estimated total NET taxable business income/loss for **2008**.

ITEM 3: List the total amount paid by business in **2008** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2008** for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in **2008** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in **2008**.

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 2008 IRS Form 1040:

You must submit photocopies of all pages of your **2008** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2008** W-2 Forms, **2008** 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 2008 IRS Form 1040:

You must submit photocopies of all **2008** W-2 Forms, **2008** 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, 2009, you must provide a copy of the 2008 Extension for Filing Request, as approved by the IRS.*

If you are an Independent Contractor or self-employed and have not filed your 2008 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, **2008** W-2 Forms, **2008** 1099/1099R, or 1098 Forms) for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2009, you must provide a copy of the 2008 Extension for Filing Request, as approved by the IRS.*

If you receive non-taxable income:

You must submit photocopies of your **2008** YEAR-END (01/01/08 - 12/31/08) 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 **2008** for **ALL** members of the household. If you list any total for line 16, you must identify source(s) in Section L.

ALONG WITH YOUR APPLICATION YOU MUST INCLUDE:

Copies of your 2008 1040, 1040A or 1040EZ form (all pages)

Form **1040** Department of the Treasury—Internal Revenue Service **2008** U.S. Individual Income Tax Return (99) IRS Use Only—Do not write or staple in this space.

Label (See instructions on page 14.) Use the IRS label. Otherwise, please print or type.

Filing Status
 Single
 Married filing jointly (even if only one had income)
 Married filing separately. Enter spouse's SSN above and full name here.
 Head of household (with qualifying person). (See page 15.) If the qualifying person is a child but not your dependent, enter this child's name here.
 Qualifying widow(er) with dependent child (see page 16)

Exemptions
 6a Yourself. If someone can claim you as a dependent, do not check box 6a.
 b Spouse
 c Dependents:
 (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) Qualifying child for child tax credit (see page 17) (5) Ined with you due to divorce or separation (see page 18) (6) Dependents on 6c not entered above

Income
 7 Wages, salaries, tips, etc. Attach Form(s) W-2
 8a 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 (see page 21)
 10 Taxable refunds, credits, or offsets of state and local income taxes (see page 22)
 11 Alimony received
 12 Business income or (loss). Attach Schedule C or C-EZ
 13 Capital gain or (loss). Attach Schedule D if required. If not required, check here
 14 Other gains or (losses). Attach Form 4797
 15a IRA distributions
 b Taxable amount (see page 23)
 16a Pensions and annuities
 b Taxable amount (see page 24)
 17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E
 18 Farm income or (loss). Attach Schedule F
 19 Unemployment compensation
 20a Social security benefits
 b Taxable amount (see page 26)
 21 Other income. List type and amount (see page 28)
 22 Add the amounts in the far right column for lines 7 through 21. This is your **total income**

Adjusted Gross Income
 23 Educator expenses (see page 28)
 24 Certain business expenses of reservists, performing artists, and fee-basis government officials. Attach Form 2106 or 2106-EZ
 25 Health savings account deduction. Attach Form 8889
 26 Moving expenses. Attach Form 3903
 27 One-half of self-employment tax. Attach Schedule SE
 28 Self-employed SEP, SIMPLE, and qualified plans
 29 Self-employed health insurance deduction (see page 29)
 30 Penalty on early withdrawal of savings
 31a Alimony paid b Recipient's SSN
 32 IRA deduction (see page 30)
 33 Student loan interest deduction (see page 33)
 34 Tuition and fees deduction. Attach Form 8917
 35 Domestic production activities deduction. Attach Form 8903
 36 Add lines 23 through 31a and 32 through 35
 37 Subtract line 36 from line 22. This is your **adjusted gross income**

Form **1040** (2008) Cat. No. 11320B

Documentation Checklist

- Copies of all pages of your 2008 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 8 1/2 x 11 paper)
- A check or money order for \$21.00 made payable to PRIVATE SCHOOL AID SERVICE. (All returned checks will incur an additional fee of \$25.00)
- A self-addressed stamped postcard or envelope if you require notification that PSAS has received your application (PSAS will not return any documentation).
- Copies of all required non-taxable income documentation.

Copies of all 2008 W-2 forms FROM ALL EMPLOYERS

Form **W-2 Wage and Tax Statement** 2008 Department of the Treasury—Internal Revenue Service Safe, accurate, FAST! Use

a Employer's social security number
b Employer identification number (EIN)
c Employer's name, address, and ZIP code
d Control number
e Employee's first name and initial Last name Suffix
f Employee's address and ZIP code
 15 State Employer's state ID number
 16 State wages, tips, etc.
 17 State income tax
 18 Local wages, tips, etc.
 19 Local income tax
 20 Locality name

1 Wages, tips, other compensation
 2 Federal income tax withheld
 3 Social security wages
 4 Social security tax withheld
 5 Medicare wages and tips
 6 Medicare tax withheld
 7 Social security tips
 8 Allocated tips
 9 Advance EIC payment
 10 Dependent care benefits
 11 Nonqualified plans
 12a See instructions for box 12
 12b
 12c
 12d

13a Salary, wages, tips, etc.
 13b
 13c
 13d

14 Other

15a Section 405A deferrals
 15b Section 405A income
 16 State tax withheld
 17 State/Payer's state no.
 18 State income

Copies of all 2008 1099 forms (where applicable)

Form **1099-MISC** 2008 Miscellaneous Income Copy B For Recipient

CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.
 1 Rents
 2 Royalties
 3 Other income
 4 Federal income tax withheld
 5 Fishing boat proceeds
 6 Medical and health care payments
 7 Nonemployee compensation
 8 Substitute payments in lieu of dividends or interest
 9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale
 10 Crop insurance proceeds
 11
 12
 13 Excess golden parachute payments
 14 Gross proceeds paid to an attorney
 15a Section 405A deferrals
 15b Section 405A income
 16 State tax withheld
 17 State/Payer's state no.
 18 State income

RECIPENT'S name
 Street address (including apt. no.)
 City, state, and ZIP code
 Account number (see instructions)

19 Payer's federal identification number
 20 Recipient's identification number

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Form **1099-MISC** (keep for your records) Department of the Treasury - Internal Revenue Service

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 **2008** 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 **2008** IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- **2008** 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 \$21.00. 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 2008 and 2009. **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 2008 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 2008 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.