

Catholic Education Fund

Student Aid Form • 2017 – 2018

• 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?

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?

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

F TAXABLE INCOME - The 2016 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 2016	Estimate 2017
1. Total number of exemptions claimed on Federal Income Tax form:	_____	_____
2. Parent/Guardian A total taxable income from W-2 wages. (Total income for Parent A only)	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (Total income for Parent B only)	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedules C, E, and/or F from your IRS 1040) See 2016 1040 lines 12, 17, and 18	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2016 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2011 1040 A lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. See 2016 1040 line 36 or 1040 A line 20	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ See 2016 1040 line 37 or 1040 A line 21	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 2016 1040 line 60 or 1040 A 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 **1/1/16-12/31/16** 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
a. Medicaid received in 2016? <input type="checkbox"/> Yes <input type="checkbox"/> No	
13. Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)	\$ _____ per year
a. Social Security income (SSI ONLY) total received in 2016 * (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 2016	\$ _____ per year
b. total used for household expenses	\$ _____ per year
15. Housing Assistance (Sec. 8, HUD, etc.)	\$ _____ per year
a. Religious Housing Assistance total received in 2016 (parsonage, manse, 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 2016	\$ _____ per year

H HOUSING INFORMATION

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 12/31/16)

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 within the past 12 months:

Loss of job Death in the family Recent separation/divorce Shared custody Change in family living status

High debt Change in work status Child support reduction Bankruptcy Medical/Dental expenses

College expenses Shared tuition Income reduction Illness or injury Other (Explain lines below)

Parent/Guardian A: _____
Print Name

SS#: _____

K

Business Income Estimate (2016 Totals)

(If you have not filed your 2016 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? (DO NOT LEAVE BLANK)	\$ _____	\$ _____	\$ _____
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?		\$ _____	

L

Documentation Requirements

A complete photocopy of your **2016** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2016** W-2 Forms, **2016** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

If you have not filed the current year tax return please provide a copy of your last return.

Make a copy of the form for your files and mail a copy to:

**SS. Simon and Jude Catholic Education Fund
8 Cavanaugh Court
West Chester, PA. 19382**

Please contact Ron Avellino (ron@simonandjude.org or 610-696-3624) if you have any questions.

Parent / Guardian A _____

Date: _____

Parent / Guardian B _____

Date: _____