

HUDSON COUNTRY MONTESSORI SCHOOL

TUITION ASSISTANCE APPLICATION

Please check appropriate campus:

Danbury, CT _____
Phone: (203) 744-8088

New Rochelle, NY _____
Phone: (914) 636-6202

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

1. Detailed copies of all pages and Schedules of your 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 W-2 Wage and Tax Statement Forms (**Please make sure all documentation is copied on regular 8.5 x 11 paper**).
3. Documentation of TOTAL AMOUNTS received for all Non-Taxable Income (see Section G for specific requirements).
4. This application filled out in its entirety, signed and dated by the Parent(s) or Guardian(s) listed in Sections A and B.
5. An Enrollment Application must be submitted prior to submitting the Tuition Assistance Application.

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

KEEP A COPY OF THIS APPLICATION FOR YOUR RECORDS.

STUDENT AID FORM

Important: Print clearly and neatly with a ball point pen

A PARENT, GUARDIAN or OTHER ADULT

Last Name First Name MI

_____ - _____ - _____ (____) _____

Social Security # (Area Code) Home Number

Address Apt #

City State Zip

(____) _____

(Area Code) Work Phone Email Address

Employed By

B PARENT, GUARDIAN or OTHER ADULT

Last Name First Name MI

_____ - _____ - _____ (____) _____

Social Security # (Area Code) Home Number

Address Apt #

City State Zip

(____) _____

(Area Code) Work Phone Email Address

Employed By

C 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 _____

Dependent Last Name	Dependent First Name	MI	Age	Name of School	Age in the fall of 2018	Applying for Aid Yes/No

D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the school year: Parents/Guardians _____ Children _____ Other* _____

*Please explain relationship to Parent _____

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

a) Single, Never Married* b) Married c) Widowed d) Divorced* e) Remarried* f) Separated* g) Residing w/Significant Other h)

Other _____

*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) _____ 5. Who claimed student as a tax dependent for submitted tax year _____
2. Date of Divorce (Month/Year) _____ 6. Who is responsible for the tuition for the dependent(s) listed in Section C?
3. Non-Custodial Parent _____ Father _____ % Name _____
 Last Name First Name MI Mother _____ % Name _____
 Other _____ % Name _____
4. Do you receive or pay child support? Receive: \$ _____ per year
 Pay \$ _____ per year

F NON-TAXABLE INCOME

List the total amount received for all recipients in household.

7. Child Support \$ _____
8. Cash Assistance \$ _____
9. Food Stamps \$ _____
10. Social Security Income (SSI/SSD, etc.) \$ _____
 (Provide documentation for all recipients in household)
11. Student Loans and/or Grants received
 for PARENTS education \$ _____
 (Not college attending dependents or students listed in section C)
 a. total received for submitted tax year \$ _____
 b. total used for household expenses \$ _____
12. Housing Assistance (Sec. 8, HUD, Parsonage, etc.) \$ _____
13. Other non-taxable income (Worker's Comp., Disability Pension/Retirement, etc. (Identify source(s) in J) \$ _____
14. Loans/Gifts from friends or relatives \$ _____
15. Personal Savings/Investment Accounts used for household expenses \$ _____
16. Total non-taxable income for submitted year \$ _____

H ASSETS AND INVESTMENTS

(as of 12/31 of submitted year)

20. Total amount in cash, checking and savings accounts \$ _____
21. Total value of money market funds, mutual funds stocks, bonds, CDs, or other securities \$ _____
22. Total value of IRA, Keogh, 401K, SEP or other retirement accounts \$ _____
23. If you own real estate other than your primary residence
 a. What is the fair market value? \$ _____
 b. What is the amount still owed? \$ _____
24. Do you own a business Yes No
 a. What is the fair market value? \$ _____
 b. What is the amount still owed? \$ _____
25. Do you own a farm Yes No
 a. What is the fair market value? \$ _____
 b. What is the amount still owed? \$ _____

G HOUSING INFORMATION (DO NOT LEAVE BLANK)

17. Do you rent or own your residence: Rent Own (go to line 19)
18. If renting, what is the monthly rental payment? \$ _____
 a. Amount paid by household \$ _____
 b. Amount paid by other source(s) \$ _____
19. 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? \$ _____

I UNUSUAL CIRCUMSTANCES

Circle all that apply to your situation

- | | |
|--------------------------------|-----------------------|
| Loss of job | Death in the family |
| Recent separation or divorce | Shared custody |
| Change in family living status | Change in work status |
| Child support reduction | Bankruptcy |
| Medical/Dental expenses | College expenses |
| Shared tuition | Income reduction |
| Other | Illness or injury |

Explain in Section J below

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

J EXPLANATIONS: (Continued)

K SCHOOL INVOLVEMENT/COMMITMENT

1. In what way(s) have you contributed time or talent to the school community in the past 12 months?

2. In what way(s) are you willing to contribute time or talent to the school community in the coming 12 months?

3. In what way(s) have you actively participated in the school community events in the past 12 months (i.e. Harvest Festival, Autumn Community Meetings, Family Nights, etc .

4. How much do you feel you can contribute to tuition? \$ _____

5. How much do you feel you need in assistance? \$ _____

L CERTIFICATION, AUTHORIZATION AND DOCUMENTATION CHECKLIST

1. An Enrollment Application must be submitted prior to submitting the Tuition Assistance Application.

IF YOU FILED IRS FORM 1040:

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

IF YOU HAVE NOT YET FILED IRS FORM 1040:

A complete photocopy of your most recent Form 1040, 1040A, or 1040Z (as filed with the IRS, with all schedules and forms). **If this application is submitted after April 15th, you must provide a copy of the Extension for Filing Request as approved by the IRS and copy of your last filed tax return**

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

Photocopies of your 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 receive for ALL members of the

Sign Here

I/we declare that the information on this form is true, correct and complete to the best of our knowledge.

Parent/Guardian A: _____ Date _____ Parent/Guardian B: _____ Date _____