



Student Aid Form 2012 - 2013

PARENT NAME

St. Joseph Notre Dame High School
Alameda, CA
School Code: 1299
PSAS: 0221 P-M-N-B (9-12)

Completed form must be returned to:

- Bishop O'Dowd High School
9500 Stearns Avenue, Oakland 94605
- Holy Names High School
Mail to PRIVATE SCHOOL AID SERVICE
P.O. BOX 89434, CLEVELAND, OHIO 44101-6434
- St. Elizabeth High School
1530 - 34th Avenue, Oakland 94601
- St. Joseph Notre Dame High School
1011 Chestnut Street, Alameda 94501
- Saint Mary's College High School
Mail to PRIVATE SCHOOL AID SERVICE
P.O. BOX 89434, CLEVELAND, OHIO 44101-6434

<u>School Names:</u>	<u>School Codes:</u>
Bishop O'Dowd:	1276 / 3663
Holy Names HS:	1259 / 3664
St. Elizabeth HS:	1674 / 3665
St. Joseph NDHS:	1299 / 3659
Saint Mary's CHS:	4411 / 3660

and received on or before **FEBRUARY 7, 2012.**



- On time applications will automatically be included in the Family Aid Catholic Education (FACE) program.
- Families applying, whose children attend other Oakland Diocesan schools, only need to submit one PSAS application. **However, please check with all of the schools you are applying to, to see if they will need their own application form filled out.**

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

STUDENT NAME

Please note: This application requires documentation for income received in 2011.

1. Detailed copies of all pages and Schedules of your **2011** 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(s) 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 **2011** W-2 Wage and Tax Statement Forms, all **2011** 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 8½ x 11 paper - documentation CANNOT be returned**).
3. Documentation of TOTAL AMOUNTS received in **2011** 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 \$24.00 (**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 individuals 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 and all documentation for your records.

To check the processing status of your application, go to www.psas.org.

Student Aid Form • 2012 - 2013

● IMPORTANT: Print clearly and neatly with a blue or black ball point pen ●

A Parent, Guardian, or Other Adult Responsible for Tuition

Check One: Father Mother Step-Father Step-Mother Other Adult

Last Name _____ First Name _____ M.I. _____
 Social Security Number _____ Age (_____) _____
 (Area Code) Home Phone _____
 Address _____ Apartment # (if applicable) _____
 City _____ State _____ Zip Code _____
 (_____) _____
 (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, please check and refer to Section K of this form.

B Parent, Guardian, or Other Adult Residing with Parent A

Check One: Father Mother Step-Father Step-Mother Other Adult

Last Name _____ First Name _____ M.I. _____
 Social Security Number _____ Age (_____) _____
 (Area Code) Home Phone _____
 Address _____ Apartment # (if applicable) _____
 City _____ State _____ Zip Code _____
 (_____) _____
 (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, please check and refer to Section K of this form.

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 2012? _____
 Please list all dependent children in order of oldest to youngest, including college students. Indicate each dependent's relation to Parent/Guardian A: child, foster child, grandchild, etc.

1	Dependent Last Name	Dependent First Name	M.I.	If student is known by a different last name, please list here	Age	Date of Birth
	Relation to Parent/Guardian A	Applying for Aid? <input type="radio"/> Yes <input type="radio"/> No	Student's Social Security Number	Check One: <input type="radio"/> Euro American <input type="radio"/> African-American <input type="radio"/> Latino <input type="radio"/> Native American <input type="radio"/> Asian/Pacific Islander <input type="radio"/> Other	Will this be the child's first year at this school? <input type="radio"/> Yes <input type="radio"/> No	Grade in Fall of 2012
	Name of school student plans to attend in 2012-2013		School City/State	Amount I/we can pay toward tuition \$ _____	Tuition charged per student \$ _____	School Code*
2	Dependent Last Name	Dependent First Name	M.I.	If student is known by a different last name, please list here	Age	Date of Birth
	Relation to Parent/Guardian A	Applying for Aid? <input type="radio"/> Yes <input type="radio"/> No	Student's Social Security Number	Check One: <input type="radio"/> Euro American <input type="radio"/> African-American <input type="radio"/> Latino <input type="radio"/> Native American <input type="radio"/> Asian/Pacific Islander <input type="radio"/> Other	Will this be the child's first year at this school? <input type="radio"/> Yes <input type="radio"/> No	Grade in Fall of 2012
	Name of school student plans to attend in 2012-2013		School City/State	Amount I/we can pay toward tuition \$ _____	Tuition charged per student \$ _____	School Code*

**If you choose the option of paying tuition in 10 equal payments, how much tuition do you believe you can afford per month? \$ _____ per month.
 DO NOT LEAVE BLANK - THIS MUST BE ANSWERED (FOR HIGH SCHOOL) - DO NOT INDICATE ZERO**

For additional dependents, list on separate page answering all required questions. *Refer to School Code List

D Household Information

1. Number of individuals who will reside in my/our household during the 2012-2013 school year:

Parents/Guardians _____ Children _____ Other* _____

*If Other, please explain _____

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 Single, Divorced, Remarried, or Separated, please complete Section E.

E Single, Divorced, Remarried, or Separated Parents (To be completed by the Parent/Guardian listed in Section A)

- Date of separation (Month/Year) _____
- Date of divorce (Month/Year) _____
- Non-custodial parent _____
 Last Name _____ First Name _____ M.I. _____
- Do you receive or pay child support?
 Receive \$ _____ Per year
 Pay \$ _____ Per year
 Neither

- Who claimed student as a tax dependent in 2011? _____
- 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 **2011** 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 2011	Estimate 2012
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. (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)	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income.	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ.	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ.	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ.	\$ _____	\$ _____
9a. Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	\$ _____	\$ _____
9b. Charitable Contributions as reported on Schedule A, line 19 of your IRS 1040 form.	\$ _____	\$ _____

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

c. Are you current on your monthly payment? Yes No

If No, what was the total amount paid in **2011**? \$ _____

22. If you own a 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

d. Are you current on your monthly payment? Yes No

If No, what was the total amount paid in **2011**? \$ _____

G Non-Taxable Income

List the **total amount** received from **1/1/11-12/31/11** for all recipients in the household. **DO NOT** list monthly amounts.

10. Child Support \$ _____ per year

11. Cash Assistance (TANF) \$ _____ per year*

12. Food Stamps and/or W.I.C. \$ _____ per year*

a. Medicaid received in 2011? Yes 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 2011 \$ _____*

(Provide documentation for all recipients in household.)

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 2011 \$ _____*

b. Total used for household expenses \$ _____ per year*

15. Housing Assistance (Sec. 8, HUD, etc.) \$ _____ per year*

a. Religious Housing Assistance (parsonage, manse, etc.) Total received in 2011 \$ _____*

16. Other non-taxable income (Working for cash, Adoption and/or Foster Subsidy, Worker's Comp., Disability, Pension/Retirement, etc. Identify source(s) in Section N) \$ _____ per year*

a. **Any and all Military/VA Benefits and/or Compensation** Total received in 2011 (Identify source(s) in Section N) \$ _____ 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 2011 \$ _____ per year

*You must provide 2011 YEAR-END documentation for items 11-16a; either a YEAR-END Statement from the appropriate Public Agency, or documentation showing totals from 1/1/11-12/31/11.

I Assets & Investments (Current Values)

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 \$ _____

a. What was your total contribution to your retirement account(s) in **2011** (IRA, Keogh, 401K, SEP, etc.)? \$ _____

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)

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

Keep a copy of this completed application and all documentation for your records.

Go to next page

Parent/Guardian A: _____
Print Name

SS#: _____

K Business Income Estimate (2011 Totals)

(If you have not filed your 2011 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 N. \$ _____
6. If you own rental property: What was the total amount of Rental Income received? \$ _____

L Non Custodial Parent Information (not responsible for tuition)

Check One: Father Mother Step-Father Step-Mother Other Adult

Last Name _____ First Name _____ M.I. _____

Social Security Number _____ Age _____ (_____) _____
(Area Code) Home Phone

Address _____ Apartment # (if applicable) _____

City _____ State _____ Zip Code _____

Occupation/Title/Rank _____ (_____) _____
(Area Code) Work Phone

If this parent is self-employed, check this box.

E-mail address _____

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

M Additional Asset Information

1. List all family automobiles, trucks, RV's, boats, etc., and the year, make and model of each.

2. If student(s) has a trust fund and/or education fund, what is the total value? \$ _____

N Explanations (Use this space to explain any answers which may need clarification.)

O Certification, Authorization, and Documentation Requirements

WHAT IS REQUIRED 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(s)/Guardian(s) listed in Sections A and B.
2. A check or money order made payable to **PRIVATE SCHOOL AID SERVICE** in the amount of **\$24.00**. *This is a non-refundable application fee.*

If you have filed a 2011 IRS Form 1040:

A complete photocopy of your **2011** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

If you have not yet filed a 2011 IRS Form 1040:

A complete photocopy of your most recent Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules). 2011 W-2 Forms, 2011 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2012, you must provide a copy of the 2011 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 **2011** 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 AMOUNTS** received in **2011** 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 my/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.

**Mail completed application and photocopies of all documentation to:
PRIVATE SCHOOL AID SERVICE, P.O. BOX 89434, CLEVELAND, OH 44101-6434**

Questions? Call: (440) 892-4272
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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. Indicate the relation to Parent/Guardian A listed in Section A of the application (i.e. child, grandchild, foster child, stepchild, etc.). 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 (**2012-2013**); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

If "No" is checked for a student listed in Section C, that student will not be considered for tuition assistance. 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 the 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 the parent listed in Section A.

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

E Single, Divorced, Remarried, or Separated 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 2011, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2011. Be sure to estimate the income in Section F for 2012.

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 **2011** and estimated amounts for **2012**.

ITEM 1: Enter the total number of exemptions you claimed on your **2011** IRS Form 1040, 1040A, or 1040EZ.

ITEM 2: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2011** W-2 forms and/or **2011** 1099 forms from all employers.

ITEM 3: Enter the total **2011** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2011** W-2 forms and/or **2011** 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 **2011**, you must also fill out Section K of this application.

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 N), 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 2011.**

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.

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.

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

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

ITEM 9b: Enter the total amount of Charitable Contributions as reported on Schedule A, line 19 of your IRS Form 1040 (attach Schedule A).

Keep a copy of this completed application and all documentation for your records

G Non-Taxable Income

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2011** 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 **2011** for all children in the household.

ITEM 11: Cash Assistance (TANF): Report total amount received for **2011**.

ITEM 12: Food Stamps and/or W.I.C.: Report total amount received for **2011**. Do not combine with TANF or Medicaid.

ITEM 12a: Did you receive Medicaid in **2011**?

ITEM 13: Social Security benefits: Report the total non-taxable (SSA/SSD, etc.) amount received in **2011** for all recipients in household.

ITEM 13a: Social Security benefits: Report the total non-taxable (SSI ONLY) amount received in **2011** for all recipients in household.

ITEM 14: Student loans and/or grants: Report the total amount received in **2011** 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 **2011**.

ITEM 15: Housing assistance: Report the total amount received for **2011**. Identify in Section N all sources of Housing assistance (government assistance, Section 8, HUD, family/friends or other sources), including monies received toward rental/mortgage payments and/or utilities.

ITEM 15a: Religious Housing assistance: Report the total amount received for **2011**.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in **2011** including: Working for cash, Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; 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); adoption and/or foster care subsidy, or any other benefit or income not subject to taxation by any government (Refugee Assistance, etc.). Identify source(s) in Section N.

ITEM 16a: Any and all Military/VA Benefits and/or Compensation: Provide your Leave and Earnings Statement (if applicable) and report the total amount received for **2011** of food and other living allowances paid to members of the military, veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.), VA Educational Work-Study, etc. Identify source(s) in Section N.

ITEM 17: Loans/Gifts received from friends or relatives: Report the total amount received in **2011**.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in **2011** for household expenses.

ITEM 19: Total non-taxable income for 2011: Add together Items 10-18.

H Housing Information

ITEMS 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 21c: Indicate whether you are current on your monthly rental payment and if not, what the actual amount was that you paid in **2011**.

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.

ITEM 22d: Indicate whether you are current on your monthly mortgage payment and if not, what the actual amount was that you paid in **2011**.

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. List total amount contributed in **2011** for Item 25a.

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 **2011** 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 **2011** 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 2011 Business Income Estimates if you have not filed your 2011 Tax Return.

ITEM 1: List estimated total GROSS taxable business income for **2011**.

ITEM 2: List estimated total NET taxable business income/loss for **2011**.

ITEM 3: List the total amount paid by business in **2011** for home rent or mortgage.

ITEM 4: List the total amount paid by business in **2011** for personal automobile.

ITEM 5: List the total amount of personal expenses paid by business in **2011** that do not fall into one of the categories above.

ITEM 6: List total amount of estimated rental income received in **2011**.

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 N, if necessary.

N 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.

O Certification, Authorization, and Documentation Requirements

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 processed without the appropriate signature(s) and the appropriate documentation.

REQUIRED DOCUMENTATION

If you have filed your 2011 IRS Form 1040:

You must submit photocopies of all pages of your **2011** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2011** W-2 Forms, **2011** 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 2011 IRS Form 1040:

You must submit photocopies of all **2011** W-2 Forms, **2011** 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, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you are an Independent Contractor or self-employed and have *not* filed your 2011 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), **2011** W-2 Forms, **2011** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2012, you must provide a copy of the 2011 Extension for Filing Request, as approved by the IRS.***

If you receive non-taxable income:

You must submit photocopies of your **2011** YEAR-END (01/01/11 - 12/31/11) 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 **2011** for ALL members of the household. If you list any total for line 16, you must identify source(s) in Section N.



Use just one form for all children in the family applying for assistance.

This form must be postmarked no later than _____.

List School Code Number in Section C

Code	School Name	City
4924/3601	St. Joseph	Alameda
1299/3659	St. Joseph Notre Dame HS	Alameda
3602	St. Philip Neri	Alameda
3638	Holy Rosary	Antioch
1702/3604	Madeline	Berkeley
4411/3660	St. Mary's College HS	Berkeley
4925/3605	Our Lady of Grace	Castro Valley
4935/3706	Carondelet HS	Concord
4402/3661	De La Salle HS	Concord
3641	Queen of All Saints	Concord
3639	St. Agnes	Concord
3640	St. Francis	Concord
3642	St. Isidore	Danville
7306/3606	St. Raymond	Dublin
4938/3643	St. Jerome	El Cerrito
3644	St. John the Baptist	El Cerrito
3610	Dominican Kin	Fremont
3607	Holy Spirit	Fremont
3609	Our Lady of Guadalupe	Fremont
1200/3608	St. Joseph	Fremont
7479/3611	All Saints	Hayward
3702	Moreau Catholic HS	Hayward
3612	St. Bede	Hayward
7307/3613	St. Clement	Hayward
4926/3614	St. Joachim	Hayward
4927/3645	St. Perpetua	Lafayette
3615	St. Michael	Livermore

Code	School Name	City
3646	St. Catherine	Martinez
1275/3662	St. Edward	Newark
1276/3663	Bishop O'Dowd HS	Oakland
1259/3664	Holy Names HS	Oakland
3618	St. Anthony	Oakland
4960/3624	St. Elizabeth	Oakland
1674/3665	St. Elizabeth HS	Oakland
7319/3625	St. Jarlath	Oakland
4067/3626	St. Lawrence O'Toole	Oakland
3627	St. Leo	Oakland
3630	St. Martin de Porres	Oakland
3631	St. Theresa	Oakland
3632	Corpus Christi	Piedmont
3647	St. Joseph	Pinole
7305/3648	St. Peter Martyr	Pittsburgh
4929/3649	Christ the King	Pleasant Hill
4940/3708	Salesian HS	Richmond
3650	St. Cornelius	Richmond
3651	St. David	Richmond
3652	St. Patrick	Rodeo
3633	Assumption	San Leandro
4928/3634	St. Felicitas	San Leandro
7472/3635	St. Leander	San Leandro
3636	St. John	San Lorenzo
3653	St. Paul	San Pablo
3637	Lady of Rosary	Union City
4962/3654	St. Mary	Walnut Creek

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 **2011** 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 **2011** IRS Form 1040, or you do not file, please see the Required Documentation Section of the instructions.)
- **2011** W-2 and/or 1099 Forms for individual(s) listed in Sections A and B (**Please make sure all documentation is copied on regular 8½ x 11 paper**).
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of \$24.00. All returned checks will be subject to an additional \$25.00 fee.
 - ✓ Print clearly and neatly with a blue or black ball point pen.
 - ✓ **Make a photocopy of your completed Student Aid Form and all supporting documentation 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 cannot be returned.**

PSAS CANNOT PROCESS YOUR APPLICATION IF YOU HAVE NOT INCLUDED THE REQUIRED DOCUMENTATION AND APPLICATION FEE.

Other Common Errors

A & B Parent, Guardian, or Other Adult

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.

C Student Information

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.*

D Household Information

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 N if necessary for explanation.

E Single, Divorced, Remarried, or Separated Parents

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

F Taxable Income

Answer Items 1–9b for BOTH **2011** and **2012**. *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.

G Non-Taxable Income

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

H Housing Information

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, c, and d.

I Assets and Investments

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 Items 27 or 28 and are estimating **2011** income, complete Section K of the application. *You must include Schedule C, E and/or Schedule F from your IRS Form 1040.*

J Unusual Circumstances

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.

K Business Income (if estimating 2011 income)

Answer each question that pertains to your estimated income.

N Explanation

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

O Certification, Authorization, and Documentation Requirements

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