



Student Aid Form 2012 - 2013 BLOCS

(BUSINESS LEADERSHIP ORGANIZED FOR CATHOLIC SCHOOLS)
Educational Improvement Tax Credit (EITC)



Building a
Brighter Future,
One Child at a Time

www.BLOCS.org

SCHOOL CLOSINGS & MERGERS

The Archdiocese of Philadelphia recently announced that a number of schools may be closed or merged for the upcoming school year but, as of the time of printing, those changes have not been finalized.

List the school your child plans on attending in the Fall of 2012 in Section C of the application. If that school closes or merges, any scholarship awarded will follow the student to his/her new school, provided that the school is a Catholic School in the Archdiocese of Philadelphia. (For further clarification refer to page 8 of the application).

For information regarding income guidelines for families with special needs students or students attending special education schools, please contact your school administrator.

Number of Dependents	Maximum Income
1	\$72,000
2	\$84,000
3	\$96,000
4	\$108,000
5	\$120,000*

* add \$12,000 for each additional dependent

Who can apply:

- Families of students enrolling in grades Pre-Kindergarten-12 in a participating Catholic school. (See School Code List)
- Family must be a resident of the Commonwealth of Pennsylvania.
- Families CANNOT exceed PA Household Maximum Income Guidelines* as follows:

Please Note: Meeting EITC Income Guidelines does not guarantee an award. Awards are granted based on the funding available and the family's financial ranking among all qualified applicants. BLOCS continues to try to assist more families each year, but the pool of applications far outweighs the funds available, therefore prudent judgement must be used before applying.

This form must be postmarked no later than APRIL 16, 2012.

* Applications that are postmarked after April 16, 2012 will be considered late, will not be processed, and you will not be eligible for a grant for the 2012-2013 school year.

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

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 8 1/2 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 \$19.00 (**All returned checks will incur an additional fee of \$25.00.**)
5. THIS APPLICATION IS NOT TO BE SENT TO THE BLOCS OFFICE. SEND THE APPLICATION AND SUPPORTING DOCUMENTS TO: PSAS-BLOCS APPLICATION, P.O. BOX 89434, CLEVELAND, OH 44101-6434.
6. 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.

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 Apt. # COUNTY OF RESIDENCE

 City State Zip Code
 _____ (_____) _____
 (Area Code) Work Phone E-mail Address

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 Apt. # COUNTY OF RESIDENCE

 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.

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.	Age	Relation to Parent/Guardian A	Name of school student plans to attend in the Fall of 2012 DO NOT ABBREVIATE		Grade in the fall of 2012	Applying for Aid? check one		Amount I/We feel I/We can pay toward tuition?	Tuition charged yearly per student?	School Code*	Office Use Only
						City and State	School Name		Yes	No				
1						City and State	School Name		<input type="radio"/>	<input type="radio"/>				
2						City and State	School Name		<input type="radio"/>	<input type="radio"/>				
3						City and State	School Name		<input type="radio"/>	<input type="radio"/>				
4						City and State	School Name		<input type="radio"/>	<input type="radio"/>				
5						City and State	School Name		<input type="radio"/>	<input type="radio"/>				

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

***PLEASE ENTER CORRECT CODE FROM SCHOOL CODE LIST PROVIDED. INCORRECT CODES CAN DELAY RESULTS AND JEOPARDIZE YOUR OPPORTUNITY FOR AN AWARD.**

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)

1. Date of separation (Month/Year) _____

2. Date of divorce (Month/Year) _____

3. Non-custodial parent _____
 Last Name First Name M.I.

4. Do you receive or pay child support? Receive \$ _____ Per year

Pay \$ _____ Per year

Neither

5. Who claimed student as a tax dependent in 2011? _____

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 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.	[]	[]
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 2011 1040 lines 12, 17, and 18	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2011 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2011 1040A lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 36 or 1040A line 20	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 37 or 1040A line 21	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ. See 2011 1040 line 61 or 1040A line 35	\$ _____	\$ _____
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)) \$ _____ per year*

a. Any and all Military/VA Benefits and/or Compensation Total received in 2011 (Identify source(s)) \$ _____ 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 L) |
| <input type="checkbox"/> d. Change in work status | <input type="checkbox"/> h. Illness or injury | <input type="checkbox"/> l. Child support reduction | |

Office Use Only		
EITC _____	H _____	\$ _____

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 L.		\$ _____	
6. If you own rental property: What was the total amount of Rental Income received?		\$ _____	

L 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.)

- This application form filled out in its entirety, **SIGNED AND DATED BELOW** by the Parent(s)/Guardian(s) listed in Sections A and B.
- A check or money order made payable to **PRIVATE SCHOOL AID SERVICE** in the amount of **\$19.00**. *This is a non-refundable application fee.*

<p>If you have filed a 2011 IRS Form 1040:</p> <p>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).</p>	<p>If you have not yet filed a 2011 IRS Form 1040:</p> <p>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). <i>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.</i></p>	<p>If you do not file an IRS Form 1040 AND receive only non-taxable income:</p> <p>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.</p>
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I/We certify that all information on this form, as well as all supporting documentation, is true, correct, and complete to the best of my knowledge and that all household income has been reported. **I understand that deliberate misrepresentation of this information may result in the scholarship being denied or revoked, and may subject me to prosecution under applicable State laws. I understand that incorrect school codes listed in Section C can delay and jeopardize my opportunity for an award.** I authorize PSAS to return this form and all attachments to BLOCS. I authorize PSAS and BLOCS to make the results of this application available to schools. I authorize BLOCS to make this form and the information therein available to the appropriate state agency only as required by the law governing the scholarships.

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.

<p>Final Checklist: Did you include all of the following?</p> <p><input type="checkbox"/> 2011 Federal Tax Return and all Schedules/Forms <input type="checkbox"/> 2011 W-2 and 1099 Forms <input type="checkbox"/> \$19.00 Application Fee</p> <p><input type="checkbox"/> 2011 Year-End Non-taxable Income Documentation</p>	<p>Mail To: PSAS-BLOCS Application P.O. Box 89434 Cleveland, OH 44101-6434</p>
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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 \$19.00. *All returned checks will be subject to an additional \$25.00 fee.*
- THIS APPLICATION SHOULD NOT BE SENT TO THE BLOCS OFFICE. SEND TO: PSAS-BLOCS APPLICATION, P.O. BOX 89434, CLEVELAND, OH 44101-6434.
 - ✓ Print clearly and neatly with a blue or black ball point pen.
 - ✓ **Make sure you list the full name of the school and the city for the school you are applying to and list the correct school code from the list provided.**
 - ✓ **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.
 - ✓ 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.

**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, and the correct school code from the list provided. 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. (*See 2011 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 2011.** (*See 2011 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 2011 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 2011 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 2011 1040 line 61, or 1040A line 35.*)

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 L 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 L.

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 L.

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 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 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 L.

School Code List

Elementary Schools

<u>Abington</u>		<u>Glenside</u>		<u>North Wales</u>		St. Mary Interparochial	31155
Our Lady Help Of Christians*	31000	St. Luke the Evangelist	31042	Mary Mother of the Redeemer*	34108	St. Matthew School	31157
<u>Ambler</u>		<u>Gwynedd Valley</u>		St. Rose of Lima School*	31082	St. Monica School	31158
St. Anthony - St. Joseph		Gwynedd Mercy Academy	32006	<u>Norwood</u>		St. Nicholas of Tolentine School*	31159
Elementary School*	31001	<u>Hatfield</u>		St. Gabriel School*	31083	St. Peter the Apostle School*	31160
<u>Ardmore</u>		St. Maria Goretti School	31044	<u>Ottsville</u>		St. Raymond School*	31161
Regina Angelorum	35051	<u>Havertown</u>		St. John the Baptist School*	31085	St. Richard School*	31162
<u>Ardley</u>		Annunciation BVM School*	31045	<u>Oxford</u>		St. Rose of Lima School*	31163
Good Shepherd Regional School*	31204	Sacred Heart School*	31046	Sacred Heart*	31086	St. Thomas Aquinas School*	31165
<u>Aston</u>		St. Denis School*	31047	<u>Paoli</u>		St. Timothy School*	31166
St. Francis de Sales School	31003	<u>Holland</u>		St. Norbert School*	31087	St. Veronica School	31167
St. Joseph School	31004	St. Bede the Venerable School	31049	<u>Penndel</u>		St. William School*	31168
<u>Bensalem</u>		<u>Horsham</u>		Our Lady of Grace School*	31088	The DePaul Catholic School	31153
St. Charles Borromeo School*	31006	St. Catherine of Siena School*	31050	<u>Philadelphia</u>		Visitation BVM School*	31170
St. Ephrem School	31007	<u>Huntingdon Valley</u>		Annunciation B V M School*	31090	<u>Phoenixville</u>	
<u>Berwyn</u>		St. Albert the Great School	31051	Christ the King School	31092	Holy Family School*	31171
St. Monica School	31008	<u>Immaculata</u>		Epiphany of Our Lord School*	31093	<u>Plymouth Meeting</u>	
<u>Blue Bell</u>		Villa Maria Academy Lower School	32004	Gesu Catholic School*	32007	Epiphany of Our Lord*	31172
St. Helena*	31009	<u>Jenkintown</u>		Holy Child School*	31202	<u>Pottstown</u>	
<u>Bristol</u>		Immaculate Conception School	31052	Holy Cross School	31094	St. Aloysius School	31173
St. Mark School	31012	<u>Kennett Square</u>		Holy Innocents Area Catholic School*	31096	<u>Primos</u>	
<u>Broomall</u>		St. Patrick School*	31053	Holy Redeemer School	31098	St. Eugene School	31175
St. Pius X School*	31014	<u>Kimberton</u>		Holy Spirit School*	31099	<u>Quakertown</u>	
<u>Bryn Mawr</u>		St. Basil the Great School*	31054	Immaculate Heart of Mary School*	31100	St. Isidore School*	31176
Country Day School of the		<u>King Of Prussia</u>		Incarnation of Our Lord School*	31101	<u>Radnor</u>	
Sacred Heart*	32000	Mother of Divine Providence*	31055	La Salle Academy	32008	Armenian Sisters Academy School*	32011
SS. Colman-John Neumann School	31015	<u>Lafayette Hill</u>		Mary, Mother of Peace Area		<u>Ridley Park</u>	
St. Aloysius Academy*	32001	St. Philip Neri School*	31056	Catholic School	31102	St. Madeline-St. Rose School*	31177
<u>Chadds Ford</u>		<u>Lansdale</u>		Maternity B V M School*	31103	<u>Rosemont</u>	
St. Cornelius*	11020	Corpus Christi School*	31057	Mother of Divine Grace School*	31104	Rosemont School of the Holy Child*	32012
<u>Chalfont</u>		St. Stanislaus School*	31058	Nazareth Academy Grade School	32009	<u>Roversford</u>	
St. Jude School*	31017	<u>Levittown</u>		Norwood - Fontbonne Academy*	32002	Sacred Heart	31179
<u>Cheltenham</u>		Holy Family Regional School*	31203	Our Lady of Calvary School*	31108	<u>Rydal</u>	
Presentation BVM School*	31018	St. Michael the Archangel School*	31062	Our Lady of Consolation*	31109	St. Hilary of Poitiers School	31180
<u>Chester</u>		<u>Linwood</u>		Our Lady of Lourdes School*	31111	<u>Schwenksville</u>	
Drexel Neumann Academy*	35037	Holy Savior - St. John Fisher	31063	Our Lady of Mount Carmel School	31112	Blessed Teresa of Calcutta	34017
<u>Collegeville</u>		<u>Malvern</u>		Our Lady of Port Richmond*	35046	St. Mary School	31181
St. Eleanor School	31021	St. Patrick School	31064	Our Lady of Ransom School*	31113	<u>Secane</u>	
<u>Conshohocken</u>		<u>Maple Glen</u>		Our Lady of the Blessed Sacrament*	31114	Our Lady of Fatima School	31182
Conshohocken Catholic		St. Alphonsus School*	31065	Our Mother of Consolation*	31116	<u>Sellersville</u>	
Elementary School*	31023	<u>Media</u>		Our Mother of Sorrows School/ St. Ignatius*	31117	St. Agnes-Sacred Heart*	31048
<u>Darby</u>		Nativity BVM School*	31066	Pope John Paul II Regional School*	31143	Our Lady of Good Counsel School*	31183
Blessed Virgin Mary School	31025	St. Mary Magdalen School	31067	Resurrection of Our Lord*	31118	<u>Springfield</u>	
<u>Downingtown</u>		<u>Merion Station</u>		Sacred Heart of Jesus School*	31119	Holy Cross School*	31184
Regina Luminus Academy	35049	Waldron Mercy Academy*	32005	St. Anselm School*	31123	St. Francis of Assisi School	31185
St. Joseph School	31026	<u>Morrisville</u>		St. Athanasius-Immaculate Conception	31124	<u>Swarthmore</u>	
<u>Doylstown</u>		Holy Trinity School*	31069	St. Bridget School*	31129	Notre Dame de Lourdes School*	31187
Our Lady of Mount Carmel School	31027	St. John the Evangelist School*	31070	St. Cecilia School	31131	<u>Upper Darby</u>	
<u>Drexel Hill</u>		<u>Morton</u>		St. Christopher School*	31132	St. Laurence School*	31189
Holy Child Academy*	32003	Our Lady of Perpetual Help School*	31071	St. Dominic School*	31134	St. Elizabeth	32017
St. Andrew School*	31028	<u>Narberth</u>		St. Donato School*	31135	<u>Wallingford</u>	
St. Bernadette School*	31029	St. Margaret School*	31072	St. Francis De Sales School	31136	St. John Chrysostom School*	31190
St. Dorothy School	31031	<u>Newtown</u>		St. Francis Xavier School*	31137	<u>Warminster</u>	
<u>East Greenville</u>		St. Andrew School*	31074	St. Gabriel School*	31095	Nativity of Our Lord School*	31191
St. Philip Neri School*	31032	<u>Newtown Square</u>		St. George School*	31138	<u>Warrington</u>	
<u>East Lansdowne</u>		St. Anastasia School*	31075	St. Helena School*	31139	St. Joseph-St. Robert School	31192
St. Cyril of Alexandria School	31033	<u>Norristown</u>		St. Jerome School*	31142	<u>Wayne</u>	
<u>Exton</u>		Our Lady of Victory*	34016	St. Josaphat Ukrainian School*	32010	St. Katharine of Siena School	31193
SS. Phillip and James School*	31035	St. Francis of Assisi School*	31077	St. Katherine of Siena School	31146	<u>West Brandywine</u>	
<u>Feasterville</u>		St. Teresa of Avila School*	31079	St. Laurentius School	31147	Pope John Paul II	
Assumption BVM School	31038	St. Titus School*	31080	St. Malachy School	31150	Regional Catholic Elementary	35006
<u>Flourtown</u>		Visitation B V M School*	31081	St. Martha School	31151	<u>West Chester</u>	
St. Genevieve School	31039			St. Martin de Porres - <u>Lehigh</u>	31152	SS. Peter and Paul*	31194
<u>Glen Mills</u>				St. Martin of Tours School*	31154	SS. Simon and Jude School	31195
St. Thomas the Apostle School*	31040					St. Agnes School*	31196
						St. Maximilian Kolbe School*	31197
						<u>West Grove</u>	
						Assumption BVM School	31198
						<u>Willow Grove</u>	
						St. David School*	31199
						<u>Wyncote</u>	
						Ancillae-Assumpta Academy*	32013
						<u>Wyndmoor</u>	
						Regina Coeli Academy*	32016
						<u>Yardley</u>	
						Grey Nun Academy*	32015
						St. Ignatius of Antioch School*	31201

*This school includes a Pre-Kindergarten Program

LIST SCHOOL CODE IN SECTION C

Locate the City for the school you are applying to and list the correct school code for that School in Section C.

School Code List

High Schools		Special Education Schools	Early Childhood Programs
<p><u>Bensalem</u></p> <p>Holy Ghost Preparatory School 34000</p> <p><u>Bryn Mawr</u></p> <p>Country Day School of the Sacred Heart High School* 34001</p> <p><u>Devon</u></p> <p>Devon Preparatory School 34002</p> <p><u>Downingtown</u></p> <p>Bishop Shanahan High School 33000</p> <p>Regina Luminus 35050</p> <p><u>Drexel Hill</u></p> <p>Archbishop Prendergast-Monsignor Bonner High School 33001</p> <p><u>Fairless Hills</u></p> <p>Conwell-Egan High School 33003</p> <p><u>Flourtown</u></p> <p>Mount St. Joseph Academy 34003</p> <p><u>Gwynedd Valley</u></p> <p>Gwynedd Mercy Academy High School 34005</p> <p><u>Holland</u></p> <p>Villa Joseph Marie High School 34006</p> <p><u>Jenkintown</u></p> <p>St. Basil Academy 34007</p> <p><u>Lansdale</u></p> <p>Lansdale Catholic High School 33004</p> <p><u>Malvern</u></p> <p>Malvern Preparatory School 34008</p> <p>Villa Maria Academy 34009</p> <p><u>Merion Station</u></p> <p>Merion Mercy Academy 34010</p>	<p><u>Philadelphia</u></p> <p>Archbishop Ryan High School 33006</p> <p>Cristo Rey 35052</p> <p>Father Judge High School 33008</p> <p>John W Hallahan High School 33009</p> <p>Little Flower High School 33010</p> <p>Mercy Vocational High School 34011</p> <p>Nazareth Academy High School 34012</p> <p>Roman Catholic High School 33012</p> <p>SS. John Neumann - Maria Goretti Catholic High School 33014</p> <p>St. Hubert High School 33013</p> <p>St. Joseph's Preparatory School 34013</p> <p>West Philadelphia Catholic High School 33015</p> <p><u>Radnor</u></p> <p>Archbishop John Carroll High School 33017</p> <p><u>Royersford</u></p> <p>Pope John Paul II High School 35047</p> <p><u>Springfield</u></p> <p>Cardinal O'Hara High School 33018</p> <p><u>Villanova</u></p> <p>Academy of Notre Dame de Namur 34014</p> <p><u>Warminster</u></p> <p>Archbishop Wood High School 33019</p> <p><u>Wyncote</u></p> <p>Bishop McDevitt High School 33020</p> <p><u>Wyndmoor</u></p> <p>La Salle College High School 34015</p>	<p><u>Philadelphia</u></p> <p>Archbishop Ryan School for Deaf and Hard of Hearing Children 35001</p> <p>St. Lucy Day School 35002</p> <p><u>Willow Grove</u></p> <p>Our Lady of Confidence Day School 35003</p> <p><u>Wynnewood</u></p> <p>St. Katherine Day School 35004</p>	<p><u>Parkesburg</u></p> <p>Our Lady of Consolation Early Childhood Learning Center 35045</p> <p><u>Rosemont</u></p> <p>St. Thomas of Villanova 35044</p> <p><u>Strafford</u></p> <p>Our Lady of the Assumption 35042</p> <p><u>Wayne</u></p> <p>St. Isaac Jogues Preschool 35041</p>
<p>SCHOOL CLOSINGS & MERGERS</p> <p>The Archdiocese of Philadelphia recently announced that a number of schools may be closed or merged for the upcoming school year but, as of the time of printing, those changes have not been finalized.</p> <p>For the purposes of this application, please list the school your child would like to attend next year, even if it is scheduled to close/merge. (For example, if your child is currently attending an elementary school that is scheduled to merge this coming year, but he/she would like to continue attending that elementary school if it stays open, please list that school). Scholarships awarded to students at closing/merging schools will follow the student to his/her new school, provided that the school is a Catholic School in the Archdiocese of Philadelphia.</p> <p>IN SECTION C, LIST THE COMPLETE NAME OF THE SCHOOL AS IT APPEARS ON THE SCHOOL CODE LIST ALONG WITH THE CITY AND CORRECT SCHOOL CODE. DO NOT ABBREVIATE.</p> <p>INCORRECT INFORMATION LISTED IN SECTION C CAN DELAY AND JEOPARDIZE AN OPPORTUNITY FOR AN AWARD.</p> <p style="text-align: right;">LIST SCHOOL CODE IN SECTION C</p>			

*This school includes a Pre-Kindergarten Program

**SPECIAL EDUCATION VERIFICATION
SUPPLEMENTAL FORM**

*This form applies ONLY to families with Special Needs Students
or with students attending Special Education Schools*

**After completing the form take it to the school Principal or Administrator for review and signature.
Then include this form with your completed Student Aid Form.**

Parent/Guardian (from PSAS Application Section A):

Last Name

First Name

List the student(s) who qualify as a **Special Needs Student(s)** (from Section C of the application):

Student Name	School Name	School Code
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

By signing below, I, the school Principal/Administrator, verify that the above student(s) is/are Special Needs student(s) as defined by the PA Department of Education.

Signature of Principal/Administrator: _____ Date: _____

Print Name: _____ Phone Number: _____

List the student(s) who will be attending a **Special Education School** (from Section C of the application):

Student Name	School Name	School Code
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

By signing below, I, the school Principal/Administrator, verify that the above student(s) is/are attending a school that has been qualified as a Special Education School.

Signature of Principal/Administrator: _____ Date: _____

Print Name: _____ Phone Number: _____

This Form MUST be completed and submitted with the PSAS Student Aid Form if you are applying for a Special Needs Student or a student attending a Special Education School.