



# PRIVATE SCHOOL AID SERVICE

PARENT LAST NAME \_\_\_\_\_



## Student Aid Form 2011-2012 Archdiocese of Washington

This Pre-K through 12th grade application is for families of students currently enrolled in or applying to Catholic elementary, middle and high schools within the Archdiocese of Washington which includes Washington, D.C. and five Maryland counties (Montgomery, Prince George's, Charles, Calvert and St. Mary's - see [www.catholicsschoolswork.org](http://www.catholicsschoolswork.org) for Official List).

### TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

Please note the required tax year documentation.

1. Detailed copies of all pages and Schedules of your **2009** 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 **2009** W-2 Wage and Tax Statement Forms, all **2009** 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**).
3. Documentation of TOTAL AMOUNTS received in **2009** 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 \$23.00 (**All returned checks will incur an additional fee of \$25.00**).
5. This application form filled out in its entirety, signed and dated by the Parent(s) or Guardian(s) listed in Sections A and B.
6. **MAIL COMPLETED APPLICATION AND DOCUMENTATION BY DECEMBER 3, 2010 TO:**

**PRIVATE SCHOOL AID SERVICE  
PO BOX 458025  
WESTLAKE OH 44145-8025**

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

**If your expected income in 2010 is significantly different from your 2009 income, please provide a written explanation of the difference in Section L on page 5.**

**THIS APPLICATION MUST BE POSTMARKED NO LATER THAN DECEMBER 3, 2010.  
APPLICATIONS POSTMARKED AFTER THE DATE WILL NOT BE ACCEPTED.**

To check the processing status of your application, go to [www.psas.org](http://www.psas.org).

***Keep a copy of this completed application for your records.***

STUDENT LAST NAME \_\_\_\_\_

# Student Aid Form • 2011 – 2012

• **IMPORTANT: Print clearly and neatly with a ball point pen •**  
**Please refer to page 6 for instructions on each Section.**

## **A** PARENT, GUARDIAN or OTHER ADULT RESPONSIBLE FOR TUITION

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_  
 Social Security Number \_\_\_\_\_ Age \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_  
 (Area Code) Home Phone \_\_\_\_\_  
 Address \_\_\_\_\_ Apt. # \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 (\_\_\_\_\_) \_\_\_\_\_  
 (Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_  
 Employed by \_\_\_\_\_ How Long? \_\_\_\_\_ May PSAS contact you at work if  
 there are questions?  Yes  No  
 If you are self-employed, check this box and refer to Section K of this form. **PARISH CODE** \_\_\_\_\_  
 (SEE LIST)

## **B** PARENT, GUARDIAN or OTHER ADULT RESIDING WITH PARENT A

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_  
 Social Security Number \_\_\_\_\_ Age \_\_\_\_\_ (\_\_\_\_\_) \_\_\_\_\_  
 (Area Code) Home Phone \_\_\_\_\_  
 Address \_\_\_\_\_ Apt. # \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 (\_\_\_\_\_) \_\_\_\_\_  
 (Area Code) Work Phone \_\_\_\_\_ E-mail address \_\_\_\_\_  
 Employed by \_\_\_\_\_ How Long? \_\_\_\_\_ May PSAS contact you at work if  
 there are questions?  Yes  No  
 If you are self-employed, check this box and refer to Section K of this form. **PARISH CODE** \_\_\_\_\_  
 (SEE LIST)

## **C** DEPENDENTS (DO NOT LEAVE BLANK)

Number of dependent children who will attend a tuition charging school: Pre-K, elementary school, secondary school, or college in fall 2011. \_\_\_\_\_

If you have additional dependents, please check box and use the additional dependents sheet (page 3) and return it with this application.  **Additional Dependents**

If a student is entering the 9th grade, please list the two schools to which you are applying. Indicate each dependent's relation to Parent/Guardian A: child, foster child, grandchild, etc.

1	Last Name _____	First Name _____	MI _____	Age _____	Grade in Fall 2011 _____
Amount we feel we can pay towards tuition (Per Year) \$ _____		Check One: <input type="checkbox"/> Catholic <input type="checkbox"/> Non-Catholic	Check One: <input type="checkbox"/> Caucasian <input type="checkbox"/> Hispanic	<input type="checkbox"/> African-American <input type="checkbox"/> Asian <input type="checkbox"/> Other	Relation to Parent/Guardian A _____
Name of school student plans to attend in 2011/12: _____		City _____	State _____	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list) _____
Name of school student plans to attend in 2011/12: _____		City _____	State _____	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list) _____

## **D** HOUSEHOLD INFORMATION **Please refer to page 6 for instructions on each Section.**

1. Number of individuals who will reside in my/our household during the 2011-2012 school year:

Parents/Guardians \_\_\_\_\_ Children \_\_\_\_\_ Other\* \_\_\_\_\_

\*If **Other**, please explain relation to Parent \_\_\_\_\_

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

- a.  Single, never Married\*    d.  Divorced\*    g.  Other  
 b.  Married    e.  Remarried\* \_\_\_\_\_  
 c.  Widowed    f.  Separated\* \_\_\_\_\_

\*If **Divorced, Remarried, Separated or Single**, please complete **Section E**.

## **E** DIVORCED, SEPARATED OR SINGLE PARENTS (TO BE COMPLETED BY PARENT OR GUARDIAN LISTED IN SECTION A)

1. Date of separation (Month/Year) \_\_\_\_\_

2. Date of divorce (Month/Year) \_\_\_\_\_

3. Non-custodial parent \_\_\_\_\_  
 Last Name \_\_\_\_\_ First Name \_\_\_\_\_ MI \_\_\_\_\_

4. Do you receive or pay child support?  Receive \$ \_\_\_\_\_ per year  
 Pay \$ \_\_\_\_\_ per year  
 Neither

5. Who claimed student as a tax dependent in 2009? \_\_\_\_\_

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).

**C** **DEPENDENTS CONTINUED**

<b>2</b>	Last Name	First Name	MI	Age	Grade in Fall 2011
Amount we feel we can pay towards tuition (Per Year) \$		Check One: <input type="checkbox"/> Catholic <input type="checkbox"/> Non-Catholic	Check One: <input type="checkbox"/> Caucasian <input type="checkbox"/> African-American <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian <input type="checkbox"/> Other		Relation to Parent/Guardian A
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)

<b>3</b>	Last Name	First Name	MI	Age	Grade in Fall 2011
Amount we feel we can pay towards tuition (Per Year) \$		Check One: <input type="checkbox"/> Catholic <input type="checkbox"/> Non-Catholic	Check One: <input type="checkbox"/> Caucasian <input type="checkbox"/> African-American <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian <input type="checkbox"/> Other		Relation to Parent/Guardian A
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)

<b>4</b>	Last Name	First Name	MI	Age	Grade in Fall 2011
Amount we feel we can pay towards tuition (Per Year) \$		Check One: <input type="checkbox"/> Catholic <input type="checkbox"/> Non-Catholic	Check One: <input type="checkbox"/> Caucasian <input type="checkbox"/> African-American <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian <input type="checkbox"/> Other		Relation to Parent/Guardian A
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)

<b>5</b>	Last Name	First Name	MI	Age	Grade in Fall 2011
Amount we feel we can pay towards tuition (Per Year) \$		Check One: <input type="checkbox"/> Catholic <input type="checkbox"/> Non-Catholic	Check One: <input type="checkbox"/> Caucasian <input type="checkbox"/> African-American <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian <input type="checkbox"/> Other		Relation to Parent/Guardian A
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)
Name of school student plans to attend in 2011/12:		City	State	Did this child attend this school in 2010/11? <input type="checkbox"/> Yes <input type="checkbox"/> No	School Code # (see list)

# F TAXABLE INCOME

The 2009 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 2009	Estimate 2010
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 2009 1040 lines 12, 17, and 18	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. See 2009 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2009 1040 lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on you IRS 1040, 1040A, or 1040EZ. See 2009 1040 line 36 or 1040A line 20	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ See 2009 1040 line 37 or 1040A line 21	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 2009 1040 line 60 or 1040A line 37	\$ _____	\$ _____
9. Medical/Dental expenses as reported on Schedule A line 1 of your IRS 1040 Form.	\$ _____	\$ _____

# G NON-TAXABLE INCOME

List the **total amount** received from 1/1/09-12/31/09 for all recipients in household. **DO NOT** list monthly amounts.

- 10. Child support \$ \_\_\_\_\_ per year
- 11. Cash Assistance (TANF) \$ \_\_\_\_\_ per year\*
- 12. Food Stamps \$ \_\_\_\_\_ per year\*
  - a. Medicaid received in 2009?  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 2009 \$ \_\_\_\_\_\* (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 2009 \$ \_\_\_\_\_\*
  - b. total used for household expenses \$ \_\_\_\_\_ per year\*
- 15. Housing Assistance (Sec. 8, HUD, etc.) \$ \_\_\_\_\_ per year\*
  - a. Religious Housing Assistance total received in 2009 \$ \_\_\_\_\_\* (parsonage, manse, etc.)
- 16. Other non-taxable income (Workers' Comp., Disability, Pension/Retirement, etc. Identify source(s) in Section L) \$ \_\_\_\_\_ per year\*
- 17. Loans/Gifts from friends or relatives \$ \_\_\_\_\_ per year
- 18. Personal Savings/Investment Accounts used for household expenses (Do not include totals listed in Section I) \$ \_\_\_\_\_ per year
- 19. Total non-taxable income for 2009 \$ \_\_\_\_\_ per year

\*You must provide 2009 YEAR-END documentation for items 11-16; either a YEAR-END statement from the appropriate Public Agency, or documentation showing totals from 1/1/09 - 12/31/09.

# H HOUSING INFORMATION (DO NOT LEAVE BLANK)

- 20. Do you rent or own your residence?  Rent  Own (go to line 22)
- 21. If renting, what is the monthly rental payment? \$ \_\_\_\_\_
  - a. Amount paid by household \$ \_\_\_\_\_ per month
  - b. Amount paid by other source(s) \$ \_\_\_\_\_ per month
- 22. If you own your residence:
  - a. What is the current market value? \$ \_\_\_\_\_
  - b. What is the amount still owed, including home equity loans? \$ \_\_\_\_\_
  - c. What is the monthly mortgage payment? \$ \_\_\_\_\_ per month

# I ASSETS & INVESTMENTS (AS OF 12/31/09)

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

# J UNUSUAL CIRCUMSTANCES

Check all that apply to your situation within the past 12 months:

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



## 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. For parish and school codes, refer to the lists provided.

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 (2011-2012); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

PSAS will process all students listed in Section C for tuition assistance at any school or agency under contract with PSAS.

**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 parent listed in Section A.

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

### **E** DIVORCED, SEPARATED OR SINGLE PARENTS

If dependent(s) parents are divorced or separated, or do not reside in the same household, the custodial parent must provide the information requested in Section E about the non-custodial parent.

**If the date of separation took place in the year 2009, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2009. Be sure to estimate the income in Section F for 2010.**

**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 **2009** and estimated amounts for **2010**.

**ITEM 1:** Enter the total number of exemptions you claimed on your **2009** IRS Form 1040, 1040A, or 1040EZ.

**ITEM 2:** Enter the total **2009** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2009** W-2 forms and/or **2009** 1099 forms from all employers.

**ITEM 3:** Enter the total **2009** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2009** W-2 forms and/or **2009** 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 **2009**, you must also fill out Section K of this application. (*See 2009 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 2009.** (*See 2009 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 2009 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 2009 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 2009 1040 line 60 or 1040A line 37.*)

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

***Keep a copy of this completed application 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 2009** 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 **2009** for all children in the household.

**ITEM 11: Cash Assistance (TANF):** Report total amount received for **2009**.

**ITEM 12: Food Stamps:** Report total amount received for **2009**. Do not combine with TANF or Medicaid.

**ITEM 12a:** Did you receive Medicaid in **2009**?

**ITEM 13: Social Security benefits:** Report the total non-taxable (**SSA/SSD, etc.**) amount received in **2009** for all recipients in household.

**ITEM 13a: Social Security benefits:** Report the total non-taxable (**SSI ONLY**) amount received in **2009** for all recipients in household.

**ITEM 14: Student loans and/or grants:** Report the total amount received in **2009** 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 **2009**.

**ITEM 15: Housing assistance:** Report the total amount received for **2009**. 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 **2009**.

**ITEM 16: Other non-taxable income:** Report all additional non-taxable income received in **2009** including: Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.); food and other living allowances paid to members of the military, clergy or others; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); or any other untaxed benefit or income not subject to taxation by any government (Refugee Assistance, VA Educational Work-Study, etc.). Identify source(s) in Section L.

**ITEM 17: Loans/Gifts received from friends or relatives:** Report the total amount received in **2009**.

**ITEM 18: Personal Savings/Investment Accounts:** Report the total amount used in **2009** for household expenses.

**ITEM 19: Total non-taxable income for 2009:** Add together Items 10-18.

## **H** HOUSING INFORMATION

**ITEM 20 and 21:** If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

**ITEM 22a:** Determine the present value of the family home and list it. Local real estate agents should be able to help you if you are unsure.

**ITEM 22b:** Check with your lending institution and enter the amount still owed, including second mortgages.

## **I** ASSETS AND INVESTMENTS

**ITEM 23:** List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

**ITEM 24:** List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

**ITEM 25:** List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts.

**ITEM 26:** Answer Items 26a and 26b for any and all investment real estate (not including the family's primary residence), if applicable. Second homes, rental properties, and land contracts should be included.

**ITEM 27:** If you own a business, check the Yes box and answer Items 27a and 27b. If you have not filed your **2009** 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 **2009** 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 2009 Business Income Estimates if you have not filed your 2009 Tax Return.**

**ITEM 1:** List estimated total GROSS taxable business income for **2009**.

**ITEM 2:** List estimated total NET taxable business income/loss for **2009**.

**ITEM 3:** List the total amount paid by business in **2009** for home rent or mortgage.

**ITEM 4:** List the total amount paid by business in **2009** for personal automobile.

**ITEM 5:** List the total amount of personal expenses paid by business in **2009** that do not fall into one of the categories above.

**ITEM 6:** List total amount of estimated rental income received in **2009**.

If providing income estimates for more than one business, corporation or farm (Schedule C, Schedule E and/or Schedule F) please list information for each business, corporation or farm separately. Use additional sheet or Section L, if necessary.

## **L** EXPLANATION

If any specific question requires clarification, write a brief explanation in this space. If your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying.

## **M** PARENTS' CERTIFICATION, AUTHORIZATION, AND DOCUMENTATION CHECKLIST

You **must** sign the form in this section. Your signature authorizes PSAS to release the form and attachments to the contracting schools indicated in Section C. By signing the form, you also certify that the information submitted is correct. This application CANNOT be processed without the appropriate signature(s) and the appropriate documentation.

### REQUIRED DOCUMENTATION

#### **If you have filed your 2009 IRS Form 1040:**

You must submit photocopies of all pages of your **2009** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2009** W-2 Forms, **2009** 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 2009 IRS Form 1040:**

You must submit photocopies of all **2009** W-2 Forms, **2009** 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, 2010, you must provide a copy of the 2009 Extension for Filing Request, as approved by the IRS.***

#### **If you are an Independent Contractor or self-employed and have not filed your 2009 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), **2009** W-2 Forms, **2009** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2010, you must provide a copy of the 2009 Extension for Filing Request, as approved by the IRS.***

#### **If you receive non-taxable income:**

You must submit photocopies of your **2009** YEAR-END (01/01/09 - 12/31/09) 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 **2009** for **ALL** members of the household. If you list any total for line 16, you must identify source(s) in Section L.

# ALONG WITH YOUR APPLICATION YOU MUST INCLUDE:

## Copies of your 2009 1040, 1040A or 1040EZ form (all pages)

**Form 1040** U.S. Individual Income Tax Return **2009**

**Label** (see instructions on page 14) Use the IRS label.

**Filing Status**

**Exemptions**

**Income**

**Adjusted Gross Income**

## Documentation Checklist

- Copies of all pages of your 2009 IRS Form 1040, 1040A or 1040EZ including all Schedules.
- Copies of *all* W-2 and 1099 forms for individuals listed in Sections A and B. (All documentation should be copied on regular 8 1/2 x 11 paper)
- A check or money order for \$23.00 made payable to PRIVATE SCHOOL AID SERVICE. (All returned checks will incur an additional fee of \$25.00)
- A self-addressed stamped postcard or envelope if you require notification that PSAS has received your application (PSAS will not return any documentation).
- Copies of all required non-taxable income documentation.
- Keep a copy of this completed application for your records.

## Copies of all 2009 W-2 forms FROM ALL EMPLOYERS

**W-2 Wage and Tax Statement** **2009**

Department of the Treasury - Internal Revenue Service

## Copies of all 2009 1099 forms (where applicable)

**Form 1099-MISC** **2009**

Miscellaneous Income

Copy 1 For State Tax Department

*If you do not have all of the documentation required:*

Contact the IRS for a transcript of your complete 1040, 1040A or 1040EZ, and any Schedules, etc.  
 Contact your employer for a copy of your W-2. Contact the appropriate company for a copy of your 1099.

# AVOIDING THE MOST COMMON ERRORS

**THE MOST COMMON ERROR THAT APPLICANTS MAKE IS SENDING THE APPLICATION INCOMPLETE. IN ORDER FOR AN APPLICATION TO BE REVIEWED, IT MUST INCLUDE:**

- All pages of your **2009** 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 **2009** IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)
- **2009** W-2 and/or 1099 forms for individual(s) listed in Sections A and B (**Please make sure all documentation is copied on regular 8 ½ x 11 paper**).
- Non-taxable income verification.
- A check or money order for the non-refundable application fee of \$23.00. All returned checks will be subject to an additional \$25.00 fee.
  - ✓ Print clearly and neatly with a black or dark ball point pen.
  - ✓ **Make a photocopy of your completed Student Aid Form for your records.**
  - ✓ Do not staple ANYTHING to the Student Aid Form.
  - ✓ Submit the original application only.
  - ✓ Affix proper postage to the envelope (applications without sufficient postage will be returned by the post office).
  - ✓ If you would like to receive notification that PRIVATE SCHOOL AID SERVICE has received your application, enclose a self-addressed stamped postcard or envelope with your application.
  - ✓ Do not send any original documents. Originals will not be returned.

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

## OTHER COMMON ERRORS

### SECTIONS A & B

List the parent, guardian or other adult responsible for tuition and any other adult residing in the household. Complete each section in its entirety, including age, social security number, and name of employer. If you are self-employed, check the box and refer to Section K.

### SECTION C

List all dependent children, including college students, in order of oldest to youngest. *If any dependents will attend a tuition charging school next fall, fill in all columns for those children.*

### SECTION D

This section should include the total number of parents, children and other individuals residing in the household. Any household member listed as "Other" should be identified, using Section L if necessary for explanation.

### SECTION E

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

### SECTION F

Answer Items 1–9 for BOTH **2009** and **2010**. **YOU MUST include documentation of all income received by both parents/guardians residing with the applicant(s).** If you are divorced or separated and receive child support, list the yearly amount in Section G Item 10.

### SECTION G

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

### SECTION H

If you rent your home, list your monthly rental payment, including any payments made by sources other than the household. If you own your home, answer Items 22a, b, and c.

### SECTION I

Enter the totals for Items 23, 24, and 25 based on your investment, savings, and/or checking statements. If you own rental or investment property, answer Items 26a and 26b. *You must include Schedule E from your IRS Form 1040.*

If you answered "Yes" to Items 27 or 28 and are estimating **2009** income, complete Section K of the application. *You must include Schedule C, E and/or Schedule F from your IRS Form 1040.*

### SECTION J

Check boxes for any unusual or relevant circumstances which affect the applicant. If you feel that your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

### SECTION K (If estimating 2009 income)

Answer each question that pertains to your estimated income.

### SECTION L

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

### SECTION M

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

# Archdiocese of Washington

## Parish Code List

### **District of Columbia**

19104 Annunciation  
19106 Assumption  
19108 Blessed Sacrament  
19110 Epiphany  
19114 Holy Comforter – St. Cyprian  
19115 Holy Name  
19116 Holy Redeemer  
19117 Holy Rosary  
19118 Holy Trinity  
19119 Immaculate Conception  
19120 Incarnation  
19125 Nativity  
19126 Our Lady of Perpetual Help  
19128 Our Lady of Victory  
19141 Our Lady Queen of Americas  
19127 Our Lady Queen of Peace  
19132 Sacred Heart  
19102 St. Aloysius  
19103 St. Ann  
19105 St. Anthony  
19130 St. Augustine  
19107 St. Benedict the Moor  
19109 St. Dominic  
19111 St. Francis de Sales  
19112 St. Francis Xavier  
19113 St. Gabriel  
19121 St. Joseph  
19241 St. Louis de France  
19122 St. Luke  
19123 St. Martin of Tours  
19124 St. Mary, Mother of God  
19101 St. Matthew's Cathedral  
19129 St. Patrick  
19131 St. Peter  
19133 St. Stephen Martyr  
19134 St. Teresa of Avila  
19136 St. Thomas More  
19135 St. Thomas the Apostle  
19137 St. Vincent de Paul

### **Montgomery County**

19221 Christ the King  
19244 German Pastoral Mission  
19222 Holy Cross  
19205 Holy Redeemer  
19206 Little Flower  
19227 Mother Seton  
19239 Our Lady of China  
19237 Our Lady of Grace  
19203 Our Lady of Lourdes  
19218 Our Lady of Mercy  
19328 Our Lady of Sorrows  
19243 Our Lady of the Presentation

19242 Our Lady of the Visitation  
19240 Our Lady of Vietnam  
19234 Our Lady Queen of Poland  
19236 Resurrection  
19337 St. Andrew Kim  
19217 St. Andrew the Apostle  
19219 St. Bartholomew  
19210 St. Bernadette  
19211 St. Camillus  
19212 St. Catherine Laboure  
19215 St. Elizabeth  
19225 St. Francis of Assisi  
19202 St. Jane Frances de Chantal  
19235 St. John Neumann  
19220 St. John the Baptist  
19213 St. John the Evangelist  
19209 St. Jude  
19204 St. Martin of Tours  
19201 St. Mary, Barnesville  
19208 St. Mary, Rockville  
19214 St. Michael the Archangel  
19224 St. Patrick  
19216 St. Paul  
19207 St. Peter  
19223 St. Raphael  
19226 St. Rose of Lima

### **Prince George's County**

19302 Ascension  
19310 Holy Family, Hillcrest Heights  
19315 Holy Family, Mitchellville  
19306 Holy Redeemer  
19330 Holy Spirit  
19336 Most Holy Rosary  
19307 Mount Calvary  
19143 Nigerian Catholic Community  
19142 Our Lady of Fatima  
19334 Sacred Heart  
19303 St. Ambrose  
19319 St. Bernard  
19331 St. Bernardine  
19326 St. Columba  
19323 St. Dominic  
19333 St. Edward  
19309 St. Hugh  
19317 St. Ignatius, Oxon Hill  
19316 St. James  
19311 St. Jerome  
19304 St. John Baptist de la Salle  
19305 St. John the Evangelist  
19301 St. Joseph, Beltsville  
19308 St. Joseph, Largo

19320 St. Margaret of Scotland  
19325 St. Mark the Evangelist  
19321 St. Mary of the Assumption  
19314 St. Mary of the Mills  
19313 St. Mary, Landover Hills  
19318 St. Mary, Piscataway  
19327 St. Matthias  
19322 St. Michael, Baden  
19332 St. Nicholas  
19324 St. Philip  
19329 St. Pius X

### **Calvert County**

19438 Jesus the Divine Word  
19436 Jesus the Good Shepherd  
19433 Our Lady Star of the Sea  
19434 St. Anthony, North Beach  
19435 St. John Vianney

### **Charles County**

19406 Holy Ghost  
19437 Our Lady Help of Christians  
19408 Sacred Heart, La Plata  
19404 St. Catherine of Alexandria  
19401 St. Frances de Sales, Benedict  
19439 St. Frances de Sales (Mission), Newburg  
19403 St. Ignatius Loyola, Hilltop  
19412 St. Ignatius, Chapel Point  
19410 St. Joseph, Pomfret  
19405 St. Mary, Star of the Sea  
19402 St. Mary, Bryantown  
19440 St. Mary, Newport  
19411 St. Peter, Waldorf

### **St. Mary's County**

19415 Holy Angels  
19418 Holy Face  
19422 Immaculate Conception  
19421 Immaculate Heart  
19417 Our Lady of the Wayside  
19427 Our Lady's Church, Medley's Neck  
19416 Sacred Heart  
19420 St. Aloysius  
19428 St. Cecilia  
19424 St. Francis Xavier  
19426 St. George  
19419 St. John  
19423 St. Joseph, Morganza  
19409 St. Mary, Newport  
19425 St. Michael, Ridge  
19429 St. Peter Claver

# Archdiocese of Washington

## School Code List

### ELEMENTARY SCHOOLS

#### District of Columbia

9706 Annunciation  
9708 Blessed Sacrament  
9712 Holy Trinity  
9717 Our Lady of Victory  
9719 Sacred Heart  
9801 San Miguel  
9720 St. Ann's Academy  
9721 St. Anselm's Abbey  
(Middle School)  
9722 St. Anthony  
9723 St. Augustine  
9726 St. Francis Xavier  
9729 St. Peter's Interparish  
9730 St. Thomas More

#### Montgomery County

9811 Brookewood School  
9737 Connelly School of the Holy Child  
9738 Holy Cross  
9739 Holy Redeemer, Kensington  
9740 Little Flower, Bethesda  
9741 Mary of Nazareth  
9743 Mother of God  
9744 Our Lady of Lourdes  
9745 Our Lady of Mercy  
9747 St. Andrew the Apostle  
9748 St. Bartholomew  
9749 St. Bernadette  
9751 St. Catherine Laboure  
9752 St. Elizabeth  
9808 St. Francis International School  
9753 St. Jane Frances de Chantal  
9754 St. John the Baptist  
9755 St. John the Evangelist, Silver Spring  
9756 St. Jude  
9757 St. Martin of Tours  
9758 St. Mary, Rockville  
9759 St. Michael, Silver Spring

9802 St. Patrick  
9760 St. Peter, Olney  
9803 St. Raphael  
9746 Stone Ridge School of the  
Sacred Heart  
9812 The Avalon School  
9761 The Woods Academy

#### Prince George's County

9768 Holy Family  
9769 Holy Redeemer, College Park  
9770 Mt. Calvary  
9772 St. Ambrose  
9774 St. Columba  
9777 St. Jerome  
9779 St. John the Evangelist, Clinton  
9807 St. Joseph Regional School  
9783 St. Mary of the Assumption  
9784 St. Mary of the Mills  
9785 St. Mary's School of Piscataway  
9786 St. Mary, Landover  
9787 St. Matthias Apostle  
9788 St. Philip the Apostle  
9789 St. Pius X Regional

#### Southern Maryland

9702 Archbishop Neale  
9701 Cardinal Hickey Academy  
9794 Father Andrew White, SJ  
9796 Little Flower, Great Mills  
9797 Mother Catherine Spalding  
9700 Our Lady, Star of the Sea  
9798 St. John, Hollywood  
9704 St. Mary, Bryantown  
9799 St. Michael, Ridge  
9705 St. Peter, Waldorf

### SECONDARY SCHOOLS

#### District of Columbia

9731 Archbishop Carroll High School  
9732 Georgetown Visitation  
Preparatory School  
9733 Gonzaga College High School  
9735 St. Anselm's Abbey School  
(High School)  
9736 St. John's College High School

#### Montgomery County

9762 Academy of the Holy Cross  
9811 Brookewood School  
9763 Connelly School of the Holy Child  
9901 Don Bosco Cristo Rey High School  
9765 Georgetown Preparatory School  
9766 Good Counsel High School  
9764 Stone Ridge School of the  
Sacred Heart  
9812 The Avalon School

#### Prince George's County

9790 Bishop McNamara High School  
9791 De Matha Catholic High School  
9792 Elizabeth Seton High School  
9793 St. Vincent Pallotti High School

#### Southern Maryland

9800 St. Mary's Ryken High School