

Tucker Maxon School Financial Aid Application

2023-24 School Year

DEADLINE: APRIL 19, 2023 at 5 PM

Applications submitted by March 9, 2023 will be reviewed for early decision.

WHAT IS REQUIRED TO PROCESS THIS APPLICATION

(If any of the following is missing, your application will be considered incomplete and will not be considered)

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. **If you have filed a 2022 IRS Form 1040:** Please provide a complete copy of your 2022 Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules) and 2022 W-2 Forms, 2022 1099/1099R, or 1098 Forms for any wage-earning adult residing with or responsible for the student applicant(s).
3. **If you have not filed a 2022 IRS Form 1040:** Please provide a complete copy of your draft 2022 Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules) and 2022 W-2 Forms, 2022 1099/1099R, or 1098 Forms for any wage-earning adult residing with or responsible for the student applicant(s).
4. If this application is submitted after April 19, 2023 deadline, and you are not including tax documents, you must provide a copy of your 2022 Extension for Filing Request.
5. **If you do not file an IRS Form 1040 AND/OR receive non-taxable income:** Please provide copies of all your 2022 year-end Social Services statements, Food Stamp documentation, Housing Assistance documentation, Student Loans and/or grant documentation for all parent's or guardian's education, Social Security income statements showing total amounts received in 2022 for all members of the household.
6. Please provide a copy of the **Personal Balance Sheet** at the end of this application for the entire household. This is required for all applications.

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Student: _____ Grade: _____ (next school year)

Student: _____ Grade: _____ (next school year)

Student: _____ Grade: _____ (next school year)

Section A: Parent, Guardian, or Other Adult Responsible for Tuition (For purposes of this application, the term parent is based on the Free Application for Federal Student Aid (FAFSA) form. It includes custodial parents, ex-spouses and step-parents.)

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

First Name: _____ Middle Initial: _____ Last Name: _____

Social Security Number: _____ Age: _____ Phone: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Work Phone: _____ Email: _____

Additional Parent, Guardian, or Other Adult Responsible for Student

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

First Name: _____ Middle Initial: _____ Last Name: _____

Social Security Number: _____ Age: _____ Phone: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Work Phone: _____ Email: _____

Section B: Dependents (Do Not Leave Blank)

Number of dependent children who will attend a tuition charging school: preschool, elementary school, secondary school, or college in the fall of 2023? _____

Please list all dependent children **in order of oldest to youngest**, including college students. Indicate each dependent's relationship to Parent/Guardian A: child, foster child, grandchild, etc. To qualify as a dependent here, you must also list that person as a dependent on your 2022 tax return.

1. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

2. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

3. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

4. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

5. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

6. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

7. First Name: _____ MI ___ Last Name: _____ Age: _____

Relation to Parent/Guardian in Section A: _____

Section C: Household Information

1. Number of individuals who will reside in my/our household during the 2023-24 school year.

Parents/Guardians _____ Children _____ Other _____ (If other please explain below)

2. Who claimed student as a tax dependent in 2022 _____

3. What adults are responsible for the tuition for the dependent(s) listed in Section C?

Please check all that apply.

Father ___ ___ % Name: _____

Mother ___ ___ % Name: _____

Other ___ ___ % Name: _____

Section D: Non-Taxable Income

Please list the total amount received from 1/1/22-12/31/22 for all recipients in the household.

Please list the total amount per year. **Do not** list monthly amounts here.

1. Child support \$ _____ (Total in 2022)

2. Alimony/Spousal support \$ _____ (Total in 2022)

3. Cash Assistance \$ _____ (Total in 2022)

4. Food Stamps and/or WIC \$ _____ (Total in 2022)

5. Medicaid received in 2022 Yes _____ No _____

6. Social Security income (SSA/SSD, SSI, etc.) \$ _____ (Total in 2022)

(Provide documentation for all recipients in household.)

7. Student loans and/or grants received for PARENT's education \$ _____ (Total in 2022)

8. Total amount of loans and/or grants used for household expenses \$ _____ (Total in 2022)

9. Housing Assistance (Sec. 8, HUD, etc.) \$ _____ (Total in 2022)

10. Other non-taxable income (working for cash, adoption and/or foster subsidy, worker's comp, disability, pension, retirement, etc. Identify sources below. \$ _____ (Total in 2022)

11. Any Military/VA Benefits and/or Compensation. \$ _____ (Total in 2022)

Identify sources below.

Sources of other non-taxable income: _____

12. Loan or gifts from relatives \$ _____ (Total in 2022)

Total non-taxable income for 2022 (items 1-12 above) \$ _____ (Total in 2022)

Section E: Housing Information

Do you rent or own your residence? _____

If you rent:

1. What is your total monthly rental payment? _____ per month
2. Amount paid by parents or guardians listed in this application? _____ per month
3. Amount paid by other source(s) _____ per month
4. Are you current on your monthly payment? _____ (yes or no)
5. If no, what is the total amount you owe (behind in payments)? _____

If you own:

1. What is the current market value of the home? _____
2. What is the amount still owed? _____
3. What amount is paid by other sources? _____
4. What is your monthly mortgage payment? _____
5. Are you currently behind on your monthly mortgage payment? _____
6. If yes, what is the total amount owed (behind in payments)? _____
7. Are you in a foreclosure process on your home? _____ (yes or no)

Section F: Assets and Investments (current values)

1. Total amount in all cash, checking, and savings accounts _____
2. Total value of money market funds, mutual funds, stocks
Bonds, CDs, or other securities _____
3. Total value of IRA, KEOGH, 401K, 403B, SEP, or other retirement accounts _____
4. Total contribution to your retirement account(s) in 2022 _____
5. Do you own real estate other than your primary residence? _____ (yes or no)
What is the current market value? _____
What is still owed on the property? _____
6. Do you own a business? _____
What is the fair market value of your business? _____
What is the amount still owed on your business or business loans? _____
7. Do you own a farm? _____
What is the fair market value of your farm? _____
What is the amount still owed on your farm? _____

Section G: Special Circumstances (Please circle all that apply to your situation since September 1, 2022)

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

Please explain financial impact: _____

*Please attach an optional letter explaining any special circumstances if you need more space.

Section H: Business Income Estimate (2022 totals)

If you have not filed a 2022 Tax Return and are Self-Employed, own a business, rental property, and/or farm, please fill out this section. **Do not leave blank** if you have business income.

1. What is your total estimated GROSS business taxable income?
Schedule C _____ Schedule D _____ Schedule F _____
2. What is your total NET business taxable income/loss?
Schedule C _____ Schedule D _____ Schedule F _____
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 below:
6. If you own rental property: What was the total amount of Rental Income received?

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 Tucker Maxon School to use this document and all the attachments for financial aid request only. I/We agree to apply for the AG Bell, Travelers Protective Association (TPA) and other applicable scholarships by their deadlines.

Parent/Guardian A: _____ Date: _____

Parent/Guardian B: _____ Date: _____

Name(s)
Personal Balance Sheet
Date

Assets	
Cash & Cash Equivalents	
Cash on hand	
Checking accounts	
Savings accounts	
Money markets	
Certificates of Deposit	
Other	
Total Cash & Cash Equivalents	\$ -
Brokerage Accounts	
Stocks	
Mutual funds	
Municipal bonds	
Government bonds	
Corporate bonds	
Other 1	
Other 2	
Total Brokerage Accounts	\$ -
Retirement Accounts	
401(k)	
403(b)	
457	
IRA - Roth	
IRA - Traditional	
Profit Sharing	
Pension	
Total Retirement Accounts	\$ -
Property	
Primary residence	
Secondary residence	
Rental property	
Rental property	
Investment property	
Vehicle 1	
Vehicle 2	
Recreational vehicle 1	
Recreational vehicle 2	
Total Property	\$ -
Other Assets	
Loans to friends/family	
Life insurance cash surrender value	
Jewelry	
Furnishings	
Antiques	
Collectables	
Other 1	
Other 2	
Total Other Assets	\$ -
Total Assets	\$ -

Liabilities	
Short-Term Credit	
Credit card 1	
Credit card 2	
Credit card 3	
Loans from friends/family	
Home line of credit	
Other	
Total Short-Term Credit	\$ -
Loans & Mortgages	
Primary residence	
Secondary residence	
Rental property	
Investment property	
Vehicle 1	
Vehicle 2	
Recreational vehicle 1	
Recreational vehicle 2	
Student loans	
Business loans	
401(k) loan	
Total Loans & Mortgages	\$ -
Other Liabilities	
Commitment to donate	
Other 1	
Other 2	
Other 3	
Total Other Liabilities	\$ -
Total Liabilities	\$ -

Current Net Worth	\$ -
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Net Worth Over Time	
Year 1	
Year 2	
Year 3	
Year 4	
Year 5	

