



**WILLIAM S. MALEV SCHOOLS
OF CONGREGATION BETH YESHURUN
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FINANCIAL AID FORM 2009 - 2010

IMPORTANT: PRINT CLEARLY AND NEATLY WITH A BALL POINT PEN

A PARENT, GUARDIAN OR OTHER ADULT

(residing with student)

Circle one: Father Mother Stepfather Stepmother Other

Last Name First Name MI

Social Security Number Age (area code)home phone

Address Apt. #

City State Zip

Occupation/Title/Rank (area code)wk phone

If you are self-employed, check this box
and complete Section K of this form. _____
E-mail address

Employed by How long? May we contact you at work if
there are questions? Yes No

B PARENT, GUARDIAN OR OTHER ADULT

(residing with student)

Circle one: Father Mother Stepfather Stepmother Other

Last Name First Name MI

Social Security Number Age (area code)home phone

Address Apt. #

City State Zip

Occupation/Title/Rank (area code)wk phone

If you are self-employed, check this box
and complete Section K of this form. _____
E-mail address

Employed by How long? May we contact you at work if
there are questions? Yes No

C HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2009-2010 school year.

Parents/Guardians _____ Children _____ Other* _____

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

- a. Single, never Married d. Divorced* g. Divorced/remarried
 b. Married e. Separated
 c. Widowed f. Residing w/Significant Other

3. Current marital status/housing arrangement of Parent/Guardian B:

- a. Single, never Married d. Divorced* g. Divorced/remarried
 b. Married e. Separated
 c. Widowed f. Residing w/Significant Other

*If **Other**, please explain relationship to Parent _____

*If Divorced, Divorced/Remarried, or Separated please complete

Section D.

D DIVORCED OR SEPARATED PARENTS (TO BE COMPLETED BY PARENT OR GUARDIAN FILING FOR FINANCIAL AID)

A complete and signed copy of your divorce decree must be on file.

1. Date of Separation(Month/Year) _____

6. Total amount of child support **paid** for all children in 2007 by **Parent/Guardian A** and **Parent/Guradian B** \$ _____

2. Date of Divorce (Month/Year) _____

7. Who claimed student as a tax dependent in 2008? _____

3. Non-custodial parent _____
 Last name First MI

8. According to court order, when will child support end?
 (Month/Year) _____

4. Do you receive or pay child support?
 Receive Pay Neither

9. Are there any agreements specifying a contribution for the education of this/these student(s)? Yes No

5. Total amount of child support **received** for all children in 2007 by **Parent/Guardian A** and **Parent/Guardian B**.
 \$ _____

If **YES**, how much per year? \$ _____

If **Yes**, payable by whom? \$ _____

E STUDENTS

Please list all students in order of oldest to youngest, for Religious School (including Sunday School) and Hillel High School.

Student First Name	Student Last Name	MI	Age	Grade in the fall of 2009	Applying for Aid (yes or no)	Amount I/we feel I/we can pay next year toward tuition	Tuition charged yearly per student	Office Use
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F OTHER DEPENDENTS

Student First Name	Student Last Name	MI	Age	Grade in the fall of 2009	Name of School	Total Tuition	Amount you Pay	Scholarship Received
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G TAXABLE INCOME

The 2008 federal tax return for student's household was:

- Filed (complete Sections F, G and K)
 Not filed yet (complete Sections F, G and K and see Required Documentation section)
 I/We do not file. I/We only receive non-taxable income (complete Section G only)

	2008	Estimate 2009
1. Total number of exemptions claimed on Federal Income Tax form:	_____	_____
2. Parent/Guardian A: total taxable income from W-2 wages. (List total for Parent A only).	\$ _____	\$ _____
3. Parent/Guardian B: total taxable income from W-2 wages. (List total for Parent B only).	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (See 2040 lines 12, 17, 18)	\$ _____	\$ _____
* You must complete Section K		
5. Other non-work taxable income from interest, dividends, alimony, unemployment and non-business income. See 1040 lines 8a, 9a, 11, 13, 14, 10b, 16b See 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A or 1040EZ. See 1040 line 35 or 1040A line 20.	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A or 1040EZ. See 1040 line 36 or 1040A line 21.	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. See 1040 line 62 or 1040A line 35.	\$ _____	\$ _____
9. Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	\$ _____	\$ _____

H NON-TAXABLE INCOME

List the total yearly amount for all recipients in household in 2008, NOT monthly amounts.

10. Child Support \$ _____ per year
 11. Social Security Income (SSI/SSD, etc.) \$ _____ per year*
 12. Student loans and/or grants received for PARENTS' education. (Not college attending dependents or students listed in Section E.) \$ _____ per year*
 13. Other non-taxable income (Workers' Comp, Disability, Pension/Retirement, etc. Identify Sources(s) in Section L) \$ _____ per year*
 14. Additional amounts received as gifts. \$ _____ per year
 15. Total non-taxable income for 2008 \$ _____ per year

I HOUSING INFORMATION

(DO NOT LEAVE BLANK)

Do you rent or own your residence?

- Rent Own (go to line 17)

16. If renting, what is your monthly rental payment?
 \$ _____
 a. Amount paid by household \$ _____ per mo.
 b. Amount paid by other source(s) \$ _____ per mo.
17. 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 your monthly mortgage payment? \$ _____

J ASSETS AND INVESTMENTS (as of 12/31/08)

18. Your amount in cash, checking, and savings accounts \$ _____
19. Total value of money market funds, mutual funds, stocks, bonds, CDs or other securities \$ _____
20. Total value of IRA, Keough, 401K, SEP or other retirement accounts \$ _____
21. If you own real estate other than your primary residence
- a. What is the fair market value? \$ _____
- b. What is the amount still owed? \$ _____
22. Do you own a business? Yes No
If **yes**, please complete **Section L**
- a. What is the market value of your business \$ _____
- b. What is the amount still owed? \$ _____

K UNUSUAL CIRCUMSTANCES

Check all that apply to your situation:

- a. Loss of job h. Death in family
 b. Recent Separation/Divorce i. Shared custody
 c. Change in family living status j. High debt
 d. Bankruptcy k. Child support reduction
 e. College expenses l. Medical/Dental expenses
 f. Income reduction m. Shared Tuition
 g. Illness or injury n. Other

Explain all unusual circumstances in the space provided in Section M.

L BUSINESS INCOME (IF YOU ARE SELF-EMPLOYED OR OWN A BUSINESS, RENTAL PROPERTY, S-CORP OR PARTNERSHIP)*

	2008	2009
1. What is your total GROSS business taxable income?	\$ _____	\$ _____
2. What is your total NET business taxable income/loss:	\$ _____	\$ _____
3. What is your annual salary and/or draw?	\$ _____	\$ _____
4. If your business pays your home rent or mortgage, what is the annual total?	\$ _____	\$ _____
5. If your business pays for your personal auto, what is the annual total?	\$ _____	\$ _____
6. If your business pays any other personal expenses, list total amount and explain in Section M .	\$ _____	\$ _____
7. Annual Pension/Retirement contributions.	\$ _____	\$ _____
8. If you own rental property: what was the total amount of rental income received?	\$ _____	\$ _____

*If providing income estimates for more than one business or corporation (Schedule C and/or Schedule E), please list each estimate and information requested accordingly.

Parent/Guardian A: _____ SS# _____
Print name

Parent/Guardian B: _____ SS# _____
Print name

