



BLOCS

(BUSINESS LEADERSHIP ORGANIZED FOR CATHOLIC SCHOOLS)

Educational Improvement Tax Credit (EITC) Student Aid Form

2010-2011

*Building a Brighter Future
One Child at a Time.*

www.BLOCS.org

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

EITC Income Guidelines*

Number of Dependents	Maximum Income
1	\$60,000
2	\$70,000
3	\$80,000
4	\$90,000
5	\$100,000

for additional dependents, add \$10,000 each

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 15, 2010.**

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 \$18.00 (**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 458025, WESTLAKE, OH 44145
6. This application form filled out in its entirety, signed and dated by the Parent(s) or Guardian(s) 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 for your records.

Student Aid Form • 2010 – 2011

• **IMPORTANT: Print clearly and neatly with a ball point pen** •

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 (_____) _____ Home Phone _____
 Address _____ Apt. # _____ COUNTY OF RESIDENCE _____
 City _____ State _____ Zip _____
 (_____) _____ E-mail address _____
 (Area Code) Work Phone _____

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.

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 (_____) _____ Home Phone _____
 Address _____ Apt. # _____ COUNTY OF RESIDENCE _____
 City _____ State _____ Zip _____
 (_____) _____ E-mail address _____
 (Area Code) Work Phone _____

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.

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 2010. _____

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.

1	Dependent Last Name	Dependent First Name	MI	Age	Relationship to Parent/Guardian A	Name of school student plans to enter in the fall of 2010 (PLEASE DO NOT ABBREVIATE)		Grade in the fall of 2010	Applying for Aid? (check one) YES NO	Amount I/We feel I/We can pay toward tuition	Tuition charged yearly per student	School Code*
						City/State	City/State					
1						School Name:						
						City/State:						
2						School Name:						
						City/State:						
3						School Name:						
						City/State:						
4						School Name:						
						City/State:						
5						School Name:						
						City/State:						

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

*PLEASE ENTER CORRECT CODE FROM SCHOOL CODE LIST PROVIDED

D HOUSEHOLD INFORMATION

1. Number of individuals who will reside in my/our household during the 2010-2011 school year:

Parents/Guardians _____ Children _____ Other* _____

*If Other, please explain relationship to Parent _____

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 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).

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. (List total income for Parent A only)	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (List total income for Parent B only)	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedule 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 1040A lines 8a-14b	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your 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**)
(Provide documentation for all recipients in household.) \$ _____ per year*
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 (parsonage, manse, etc.) \$ _____ per year*
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

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

22. Total amount in cash, checking, and savings accounts \$ _____
23. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities \$ _____
24. Total value of IRA, Keogh, 401K, SEP or other retirement accounts \$ _____
25. If you own real estate other than your primary residence,
- a. What is the fair market value? \$ _____
- b. What is the amount still owed? \$ _____
26. 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? \$ _____
27. 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)

Office Use Only

EITC _____ H _____ \$ _____ SNS _____ SES _____

Go to next page ⇨

K**BUSINESS INCOME ESTIMATE (2009 TOTALS)***(If you have not filed your 2009 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?	\$ _____	\$ _____	\$ _____
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 CHECKLIST****WHAT WE NEED TO PROCESS THIS APPLICATION****IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE PROCESSED**

1. This application form filled out in its entirety, **SIGNED AND DATED BELOW** by the Parent or Guardian listed in Sections A and B.
2. A check or money order made payable to PRIVATE SCHOOL AID SERVICE in the amount of \$18.00. **This is a non-refundable application fee.**
- 3.

**IF YOU HAVE FILED A
2009 IRS FORM 1040:**

A complete photocopy of your **2009** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2009** W-2 Forms, **2009** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

**IF YOU HAVE NOT YET FILED A
2009 IRS FORM 1040:**

A complete photocopy of your most recent 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 and a copy of your last filed tax return.**

**IF YOU DO NOT FILE AN IRS
FORM 1040 AND RECEIVE ONLY
NON-TAXABLE INCOME:**

Photocopies of your **2009** 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 AMOUNT** received in **2009** for **ALL** members of the household.

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 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 _____

You will not receive results from PSAS. No other agency will see or receive any information about this application or its attachments.

Final Checklist: Did you include all of the following?

- 2009 Federal Tax Return and all Schedules/Forms 2009 W-2 and 1099 Forms \$18.00 Application Fee
 2009 Year-End Non-taxable Income Documentation

Mail To: PSAS-BLOCS Application
P.O. Box 458025
Westlake, OH 44145

AVOIDING THE MOST COMMON ERRORS

**THE MOST COMMON ERROR THAT APPLICANTS MAKE IS SENDING AN INCOMPLETE APPLICATION.
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 1/2 x 11 paper)**
- Non-taxable income verification.
- A non-refundable check or money order for \$18.00 for the application fee. All returned checks will be subject to an additional \$25 fee.
- **THIS APPLICATION SHOULD NOT BE SENT TO THE BLOCS OFFICE. SEND TO PSAS-BLOCS APPLICATION, P.O. BOX 458025, WESTLAKE, OH 44145.**
 - ✓ Print clearly and neatly with a black or dark 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 application and all attachments for your records.**
 - ✓ Do not staple ANYTHING to the application.
 - ✓ 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.**

Mail to: PRIVATE SCHOOL AID SERVICE, P.O. BOX 770728, LAKEWOOD, OHIO 44107-0034

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 relationship 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 (2010-2011); the amount you feel you can pay toward tuition per year, and the amount of tuition charged per student per year.

PSAS will consider all students listed in Section C with a check in the "Yes" box for tuition assistance at any school or agency under contract with PSAS. If the "No" box is checked, that student will not be considered. For all additional dependents, use a separate sheet.

D HOUSEHOLD INFORMATION

ITEM 1: Enter total number of individuals living in 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.

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.**

ITEM 6: Enter allowable adjustments to income, such as IRA payments, self-employment tax, self-employed health insurance deduction, Keogh retirement plan and self-employed SEP deductions, penalty on early savings withdrawals, and alimony paid. Add together to arrive at your total adjustments. **DO NOT** include your standard deduction or deduction amounts for each family member.

ITEM 7: Enter total adjusted gross income as reported on your IRS Form 1040, 1040A or 1040EZ. Attach all pages of the applicable tax form (1040, 1040A, 1040EZ) for documentation.

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

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

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

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.

I ASSETS AND INVESTMENTS

ITEM 22: List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

ITEM 23: List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

ITEM 24: List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts.

ITEM 25: Answer Items 25a and 25b 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 26: If you own a business, check the Yes box and answer Items 26a and 26b. If you have not filed your **2009** tax return, complete Section K of this application.

ITEM 27: If you own a farm, 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.

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).

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.

Proof of Residency:

You must submit photocopies of your most recent PA-40 Pennsylvania State Tax Return. If you have not filed your PA-40, provide copy a Utility Bill showing your current address.

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

<u>ARCHDIOCESAN ELEMENTARY SCHOOLS</u>	<u>ARCHDIOCESAN ELEMENTARY SCHOOLS</u>	<u>ARCHDIOCESAN ELEMENTARY SCHOOLS</u>	<u>ARCHDIOCESAN ELEMENTARY SCHOOLS</u>
Abington Our Lady Help Of Christians* 31000	Glenside St. Luke the Evangelist 31042	North Wales Mary Mother of the Redeemer* 34108	St. Mary Interparochial 31155
Ambler St. Anthony - St. Joseph Elementary School* 31001	Hatboro St. John Bosco School* 31043	St. Rose of Lima School* 31082	St. Matthew School 31157
Ardasley Queen of Peace School* 31002	Hatfield St. Maria Goretti School 31044	Norwood St. Gabriel School* 31083	St. Monica School 31158
Aston St. Francis de Sales School 31003	Havertown Annunciation BVM School* 31045	Oreland Holy Martyrs School* 31084	St. Nicholas of Tolentine School* 31159
St. Joseph School 31004	Sacred Heart School* 31046	Ottsville St. John the Baptist School* 31085	St. Peter the Apostle School* 31160
Bensalem Our Lady of Fatima School* 31005	St. Denis School* 31047	Oxford Sacred Heart* 31086	St. Raymond School* 31161
St. Charles Borromeo School* 31006	Holland St. Bede the Venerable School 31049	Paoli St. Norbert School* 31087	St. Richard School* 31162
St. Ephrem School 31007	Horsham St. Catherine of Siena School* 31050	Pennel Our Lady of Grace School* 31088	St. Rose of Lima School* 31163
Berwyn St. Monica School 31008	Huntingdon Valley St. Albert the Great School 31051	Philadelphia Annunciation B V M School* 31090	St. Thomas Aquinas School* 31165
Blue Bell St. Helena* 31009	Jenkintown Immaculate Conception School 31052	Ascension of Our Lord School 31091	St. Timothy School* 31166
Bristol St. Mark School 31012	Kennett Square St. Patrick School* 31053	Christ the King School 31092	St. Veronica School 31167
Brookhaven Our Lady of Charity School* 31013	Kimberton St. Basil the Great School* 31054	Epiphany of Our Lord School* 31093	St. William School* 31168
Broomall St. Pius X School* 31014	King Of Prussia Mother of Divine Providence* 31055	Holy Child School* 31094	Stella Maris School* 31169
Bryn Mawr SS. Colman-John Neumann School 31015	Lafayette Hill St. Philip Neri School* 31056	Holy Cross School 31094	The DePaul Catholic School 31153
Chadds Ford St. Cornelius* 11020	Lansdale Corpus Christi School* 31057	Holy Innocents Area Catholic School* 31096	Visitation BVM School* 31170
Chalfont St. Jude School* 31017	St. Stanislaus School* 31058	Holy Redeemer School 31098	Phoenixville Holy Family School* 31171
Cheltenham Presentation BVM School* 31018	Lansdowne St. Philomena School 31059	Holy Spirit School* 31099	Plymouth Meeting Epiphany of Our Lord* 31172
Collegeville St. Eleanor School 31021	Levittown Immaculate Conception School 31060	Immaculate Heart of Mary School* 31100	Pottstown Blessed Teresa of Calcutta 34017
Collingdale St. Joseph School* 31022	Queen of the Universe School* 31061	Incarnation of Our Lord School* 31101	St. Aloysius School 31173
Conshohocken Conshohocken Catholic Elementary School* 31023	St. Michael the Archangel School* 31062	Mary, Mother of Peace Area Catholic School 31102	Primos St. Eugene School 31175
Croydon St. Thomas Aquinas School 31024	Linwood Holy Savior - St. John Fisher 31063	Maternity B V M School* 31103	Quakertown St. Isidore School* 31176
Darby Blessed Virgin Mary School 31025	Malvern St. Patrick School 31064	Mother of Divine Grace School* 31104	Ridley Park St. Madeline-St. Rose School* 31177
Downingtown St. Joseph School 31026	Maple Glen St. Alphonsus School* 31065	Our Lady of Calvary School* 31108	Roslyn St. John of the Cross School* 31178
Doylestown Our Lady of Mount Carmel School 31027	Media Nativity BVM School* 31066	Our Lady of Consolation* 31109	Royersford Sacred Heart 31179
Drexel Hill St. Andrew School* 31028	St. Mary Magdalen School 31067	Our Lady of Lourdes School* 31111	Rydal St. Hilary of Poitiers School 31180
St. Bernadette School* 31029	Morrisville Holy Trinity School* 31069	Our Lady of Mount Carmel School 31112	Schwenksville St. Mary School 31181
St. Dorothy School 31031	St. John the Evangelist School* 31070	Our Lady of Port Richmond* 35046	Secane Our Lady of Fatima School 31182
East Greenville St. Philip Neri School* 31032	Morton Our Lady of Perpetual Help School* 31071	Our Lady of Ransom School* 31113	Sellersville St. Agnes-Sacred Heart* 31048
East Lansdowne St. Cyril of Alexandria School 31033	Narberth St. Margaret School* 31072	Our Lady of the Blessed Sacrament* 31114	Southampton Our Lady of Good Counsel School* 31183
Elkins Park St. James School* 31034	New Hope St. Martin of Tours School* 31073	Our Mother of Consolation* 31116	Springfield Holy Cross School* 31184
Exton SS. Phillip and James School* 31035	Newtown St. Andrew School* 31074	Our Mother of Sorrows School/ St. Ignatius* 31117	St. Francis of Assisi School 31185
Fairless Hills St. Frances Cabrini School 31036	Newtown Square St. Anastasia School* 31075	Pope John Paul II Regional School* 31143	St. Kevin School* 31186
Fallsington St. Joseph the Worker School* 31037	Norristown Our Lady of Victory* 34016	Resurrection of Our Lord* 31118	Swarthmore Notre Dame de Lourdes School* 31187
Feasterville Assumption BVM School 31038	St. Francis of Assisi School* 31077	Sacred Heart of Jesus School* 31119	Upper Darby St. Laurence School* 31189
Flourtown St. Genevieve School 31039	St. Teresa of Avila School* 31079	St. Anne School* 31122	Uwchlan St. Elizabeth 32017
Glen Mills St. Thomas the Apostle School* 31040	St. Titus School* 31080	St. Anselm School* 31123	Wallingford St. John Chrysostom School* 31190
	Visitation B V M School* 31081	St. Athanasius-Immaculate Conception 31124	Warminster Nativity of Our Lord School* 31191
		St. Bridget School* 31129	Warrington St. Joseph-St. Robert School 31192
		St. Cecilia School 31131	Wayne St. Katharine of Siena School 31193
		St. Christopher School* 31132	West Brandywine Pope John Paul II Regional Catholic Elementary 35006
		St. Cypryan School 31133	West Chester SS. Peter and Paul* 31194
		St. Dominic School* 31134	SS. Simon and Jude School 31195
		St. Donato School* 31135	St. Agnes School* 31196
		St. Francis De Sales School 31136	St. Maximilian Kolbe School* 31197
		St. Francis Xavier School* 31137	West Grove Assumption BVM School 31198
		St. Gabriel School* 31095	Willow Grove St. David School* 31199
		St. George School* 31138	Yardley St. Ignatius of Antioch School* 31201
		St. Helena School* 31139	
		St. Hugh of Cluny School* 31140	
		St. Jerome School* 31142	
		St. John the Baptist School 31144	
		St. Katherine of Siena School 31146	
		St. Laurentius School 31147	
		St. Malachy School 31150	
		St. Martha School 31151	
		St. Martin de Porres - Lehigh 31152	
		St. Martin of Tours School* 31154	

***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

<u>ARCHDIOCESAN HIGH SCHOOLS</u>	<u>PRIVATE CATHOLIC ELEMENTARY SCHOOLS</u>	<u>PRIVATE CATHOLIC HIGH SCHOOLS</u>	<u>SPECIAL EDUCATION SCHOOLS</u>
Downingtown	Bryn Mawr	Bensalem	Philadelphia
Bishop Shanahan High School 33000	Country Day School of the	Holy Ghost Preparatory School 34000	Archbishop Ryan School for Deaf and
Drexel Hill	Sacred Heart* 32000	Bryn Mawr	Hard of Hearing Children 35001
Archbishop Prendergast-Monsignor	St. Aloysius Academy* 32001	Country Day School of the Sacred	St. Lucy Day School 35002
Bonner High School 33001	Chester	Heart High School* 34001	Willow Grove
Fairless Hills	Drexel Neumann Academy* 35037	Devon	Our Lady of Confidence Day School . . 35003
Conwell-Egan High School 33003	Downingtown	Devon Preparatory School 34002	Wynnewood
Lansdale	Regina Luminus Academy 35049	Flourtown	St. Katherine Day School 35004
Lansdale Catholic High School 33004	Drexel Hill	Mount St. Joseph Academy 34003	
Philadelphia	Holy Child Academy* 32003	Gwynedd Valley	
Archbishop Ryan High School 33006	Gwynedd Valley	Gwynedd Mercy Academy High School . . 34005	
Father Judge High School 33008	Gwynedd Mercy Academy 32006	Holland	
John W Hallahan High School 33009	Immaculata	Villa Joseph Marie High School 34006	
Little Flower High School 33010	Villa Maria Academy Lower School . . . 32004	Jenkintown	
Roman Catholic High School 33012	Merion Station	St. Basil Academy 34007	
SS. John Neumann - Maria Goretti	Waldron Mercy Academy* 32005	Malvern	
Catholic High School 33014	Philadelphia	Malvern Preparatory School 34008	
St. Hubert High School 33013	Gesu Catholic School* 32007	Villa Maria Academy 34009	
West Philadelphia Catholic High School . 33015	La Salle Academy 32008	Merion Station	
Radnor	Norwood - Fontbonne Academy* 32002	Merion Mercy Academy 34010	
Archbishop John Carroll High School . 33017	Nazareth Academy Grade School 32009	Philadelphia	
Royersford	St. Josaphat Ukrainian School* 32010	Mercy Vocational High School 34011	
Pope John Paul II High School 35047	Radnor	Nazareth Academy High School 34012	
Springfield	Armenian Sisters Academy School* . . 32011	St. Joseph's Preparatory School 34013	
Cardinal O'Hara High School 33018	Rosemont	Villanova	
Warminster	Rosemont School of the Holy Child* . . 32012	Academy of Notre Dame de Namur . . . 34014	
Archbishop Wood High School 33019	Wyncote	Wyndmoor	
Wyncote	Ancillae-Assumpta Academy* 32013	La Salle College High School 34015	
Bishop McDevitt High School 33020	Wyndmoor		
	Regina Coeli Academy* 32016		
	Yardley		
	Grey Nun Academy* 32015		

EARLY CHILDHOOD PROGRAMS

Parkesburg
Our Lady of Consolation Early
Childhood Learning Center 35045
Rosemont
St. Thomas of Villanova 35044
Strafford
Our Lady of the Assumption 35042
Wayne
St. Isaac Jogues Preschool 35041

LIST SCHOOL CODE IN SECTION C

*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 Department of Community and Economic Development.

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.