



# Student Aid Form

2015  
2016

PARENT NAME

Place PSAS provided School Label over all contents within these brackets

OFFICE USE ONLY  
Barcode

\_6\_090\_HOUS



## Archdiocese of Galveston-Houston

Only one application per family is necessary for all students applying for aid for schools in the Archdiocese of Galveston-Houston. Please make sure you list the entire name, city and state of the school(s) you are applying to.

**PLEASE DO NOT ABBREVIATE.**

This form must be postmarked no later than **JANUARY 30, 2015.**

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

**Please note: This application requires documentation for income received in 2013.**

1. Detailed copies of all pages and Schedules of your **2013** Federal Income Tax Return Form 1040 1040A, or 1040EZ (**as filed with the IRS**) for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. If you file Schedule(s) A, C, E, F or a statement of dependence, you must provide copies. **If you earned income outside the US, provide all income documentation.** 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 **2013** W-2 Wage and Tax Statement Forms, all **2013** 1099/1099R for Interest/Dividends, Pensions Annuities and/or Misc. Income Forms for individuals listed in Sections A and B (**Please make sure all documentation is copied on regular 8 1/2 x 11 paper - documentation CANNOT be returned.**)
3. Documentation of TOTAL AMOUNTS received in **2013** for all Non-Taxable Income (see Section I for specific requirements).
4. Check or Money Order payable to PRIVATE SCHOOL AID SERVICE for the non-refundable application fee of \$27.00. Payment by check or electronic funds transfer (ACH) is your express authorization that if the payment is returned unpaid for any reason you consent to have your bank account electronically debited twice by PSAS or its third party payment processor or collections agency. One debit will recover the item amount and the second debit will be the charge for applicable returned check and collection fees as allowed by law.
5. This application form filled out in its entirety, signed and dated by the individuals listed in Sections A and B.

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

**PSAS does not make final financial aid decisions. You will not receive results from PSAS. For more comprehensive instructions, please visit [www.psas.org/instructions](http://www.psas.org/instructions).**

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

STUDENT NAME

# STUDENT AID FORM // 2015-2016

## A Parent, Guardian, or Other Adult Responsible for Tuition

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

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_ Apartment # (if applicable): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Area Code: \_\_\_\_\_ Primary Phone: \_\_\_\_\_ Area Code: \_\_\_\_\_ Secondary Phone: \_\_\_\_\_

Email Address (REQUIRED): \_\_\_\_\_

Employed By: \_\_\_\_\_ How long? (years): \_\_\_\_\_

Preferred Contact:  Primary Phone  Secondary Phone  E-mail

**Go Green:** Check this box if you wish to receive all correspondence electronically.  
 If you are self-employed, please check and refer to Section H of this form.

## B Parent, Guardian, or Other Adult Residing with Parent A

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

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_ Apartment # (if applicable): \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Area Code: \_\_\_\_\_ Primary Phone: \_\_\_\_\_ Area Code: \_\_\_\_\_ Secondary Phone: \_\_\_\_\_

Email Address (REQUIRED): \_\_\_\_\_

Employed By: \_\_\_\_\_ How long? (years): \_\_\_\_\_

Preferred Contact:  Primary Phone  Secondary Phone  E-mail

**Go Green:** Check this box if you wish to receive all correspondence electronically.  
 If you are self-employed, please check and refer to Section H of this form.

## C Dependents

List all dependent children in order of oldest to youngest, including college students, even if you are not applying for aid for that student. Indicate each dependent's relation to Parent/Guardian A: child, foster child, grandchild, etc. **DO NOT LEAVE BLANK.**

Number of dependent children who will attend a tuition charging school in the fall of 2015?

**DO NOT LEAVE BLANK**

# in Daycare: \_\_\_\_\_ # in Pre-K: \_\_\_\_\_ # in Elementary School: \_\_\_\_\_ # in Secondary School: \_\_\_\_\_ # in College: \_\_\_\_\_ Total: \_\_\_\_\_

Dependent Last Name	Dependent First Name	M.I.	Date of Birth	Relation to Parent/Guardian A	Name, city, and state of school student plans to attend in the fall of 2015. <b>DO NOT ABBREVIATE</b>	Grade in the fall of 2015	Applying for Aid? Yes No	Amount I/We feel I/We can pay toward tuition yearly?	Tuition charged yearly per student?	School Code*
1					School Name City and State		<input type="radio"/> <input type="radio"/>			
2					School Name City and State		<input type="radio"/> <input type="radio"/>			
3					School Name City and State		<input type="radio"/> <input type="radio"/>			
4					School Name City and State		<input type="radio"/> <input type="radio"/>			
5					School Name City and State		<input type="radio"/> <input type="radio"/>			

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

\*Refer to School Code List

## D Household Information

1. Number of individuals who will reside in my/our household during the 2015-2016 school year:

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

\*If Other, please explain \_\_\_\_\_

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

a. Single  d. Divorced\*  g. Other \_\_\_\_\_

b. Married  e. Remarried\* \_\_\_\_\_

c. Widowed  f. Separated\* \_\_\_\_\_

\*If Single, Divorced, Remarried, or Separated, you are required to complete Section E.

## E Single, Divorced, Remarried, or Separated Parents (To be completed by the Parent/Guardian listed in Section A)

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

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

3. Non-custodial parent (Last, First, M.I.) \_\_\_\_\_

4. Who claimed student as a tax dependent in 2013? \_\_\_\_\_

5. Who is responsible for the tuition for the dependent(s) listed in Section C?

			Child Support (per year)			
Father	Name: _____	Names of students father is responsible for: _____	Percent of tuition paid (per student): _____%	<input type="checkbox"/> Received \$ _____	<input type="checkbox"/> Paid \$ _____	<input type="checkbox"/> Neither
Mother	Name: _____	Names of students mother is responsible for: _____	Percent of tuition paid (per student): _____%	<input type="checkbox"/> Received \$ _____	<input type="checkbox"/> Paid \$ _____	<input type="checkbox"/> Neither
Other	Name: _____	Names of students other is responsible for: _____	Percent of tuition paid (per student): _____%	<input type="checkbox"/> Received \$ _____	<input type="checkbox"/> Paid \$ _____	<input type="checkbox"/> Neither

\*If the person(s) above is/are responsible for additional students, please list in Section L.

## F Taxable Income (Answers in US\$ ONLY)

The **2013** 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 - Go to Section G

	Actual 2013	Estimate 2014
1. Total number of exemptions claimed on Federal Income Tax form.	[ ]	[ ]
2. Parent/Guardian A total taxable income from W-2 wages (Box 1). <i>Total income for Parent A only</i>	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages (Box 1). <i>Total income for Parent B only</i>	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section H) (Attach Schedules C, E, and/or F from your IRS1040) <b>See 2013 1040 lines 12, 17, and 18</b>	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. <b>See 2013 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21; See 2013 1040A lines 8a-14b</b>	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. <b>See 2013 1040 line 36 or 1040A line 20</b>	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ. <b>See 2013 1040 line 37 or 1040A line 21</b>	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040EZ. <b>See 2013 1040 line 61 or 1040A line 35</b>	\$ _____	\$ _____
9a. Medical/Dental expenses as reported on Schedule A, line 1 of your IRS 1040 form.	\$ _____	\$ _____
9b. Charitable Contributions as reported on Schedule A, line 19 of your IRS 1040 form.	\$ _____	\$ _____

## G Assets & Investments (Current Values)

10. Total amount in cash, checking, and savings accounts \$ \_\_\_\_\_

11. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities \$ \_\_\_\_\_

12. Total value of IRA, Keogh, 401K, SEP, or other retirement accounts \$ \_\_\_\_\_

a. What was your total contribution to your retirement account(s) in **2013** (IRA, Keogh, 401K, SEP, etc.)? \$ \_\_\_\_\_

13. If you own real estate other than your primary residence:

a. What is the fair market value? \$ \_\_\_\_\_

b. What is the amount still owed? \$ \_\_\_\_\_

14. Do you own a business?  Yes  No  
If **Yes**, please go to **Section H**.

a. What is the fair market value of your business? \$ \_\_\_\_\_

b. What is the amount still owed? \$ \_\_\_\_\_

15. Do you own a farm?  Yes  No  
If **Yes**, please go to **Section H**.

a. What is the fair market value of your farm? \$ \_\_\_\_\_

b. What is the amount still owed? \$ \_\_\_\_\_

## H Business Owners or Self-Employed Individuals (2013 Estimates)

If you have not filed your **2013** Tax Return, and are Self-Employed, own a business, rental property, and/or a farm please provide an estimate of your income - **DO NOT LEAVE BLANK**

	Schedule C	Schedule E	Schedule F
16. What is your total estimated <b>GROSS</b> business income?	\$ _____	\$ _____	\$ _____
<b>17. What is your total NET business taxable income/loss? (DO NOT LEAVE BLANK)</b>	\$ _____	\$ _____	\$ _____
18. If your business pays your home rent or mortgage, what is the annual total?		\$ _____	
19. If your business pays for your personal automobile, what is the annual total?		\$ _____	
20. If your business pays any portion of other personal expenses, list total amount and explain in Section L.		\$ _____	
21. If you own rental property: What was the total amount of Rental Income received?		\$ _____	

Keep a copy of this completed application and all documentation for your records.

Go to next page

## I Non-Taxable Income (Answers in US\$ ONLY)

List the **total amount** received from 1/1/13-12/31/13 for all recipients in the household. **DO NOT** list monthly amounts.

22. Child Support \$ \_\_\_\_\_ per year
23. Cash Assistance (e.g. Welfare/AFDC) \$ \_\_\_\_\_ per year\*
24. Food Stamps (SNAP) \$ \_\_\_\_\_ per year\*
- a. Medicaid received in 2013?  Yes  No
25. Social Security income (SSA/SSD, etc.)  
(Provide documentation for all recipients in household.) \$ \_\_\_\_\_ per year\*
- a. Social Security income (SSI Only)  
Total received in 2013 \$ \_\_\_\_\_\*  
(Provide documentation for all recipients in household.)
26. Student loans and/or grants received for PARENT's education (Not college attending dependents or students listed in Section C.)
- a. Total received in 2013 \$ \_\_\_\_\_\*
- b. Total used for living expenses \$ \_\_\_\_\_ per year\*
27. Housing Assistance (Sec. 8, HUD, etc.) \$ \_\_\_\_\_ per year\*
28. Other non-taxable income (Working for cash, Adoption and/or Foster Subsidy, Worker's Comp., Disability, Pension/Retirement, etc. Identify source(s) in Section L) \$ \_\_\_\_\_ per year\*
- a. Any and all Military/VA Benefits and/or Compensation. Total received in 2013 (Identify source(s) in Section L) \$ \_\_\_\_\_ per year\*
29. Loans/Gifts from friends or relatives \$ \_\_\_\_\_ per year
30. Total non-taxable income for 2013 \$ \_\_\_\_\_ per year

\*You must provide 2013 YEAR-END documentation for items 22-28a; either a YEAR-END Statement from the appropriate Public Agency, or documentation showing totals from 1/1/13-12/31/13.

## J Housing Expenses (DO NOT LEAVE BLANK)

31. Do you rent or own your residence?  Rent  Own (go to line 33)
32. If renting, what is the monthly rental payment? \$ \_\_\_\_\_
- a. Amount paid by household \$ \_\_\_\_\_ per month
- b. Amount paid by other source(s) \$ \_\_\_\_\_ per month
- c. Are you current on your monthly payment?  Yes  No  
If No, what was the total amount paid in 2013? \$ \_\_\_\_\_
33. If you own a residence:
- a. What is the current market value? \$ \_\_\_\_\_
- b. What is the amount still owed, including home equity loans? \$ \_\_\_\_\_
- c. What is the monthly mortgage payment? \$ \_\_\_\_\_ per month
- d. Are you current on your monthly payment?  Yes  No  
If No, what was the total amount paid in 2013? \$ \_\_\_\_\_

## K Unusual Circumstances

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

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

**L Explanations (Use this space to explain any answers which may need clarification.)**

\_\_\_\_\_

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**M Certification, Authorization, and Documentation Requirements**

**WHAT IS REQUIRED TO PROCESS THIS APPLICATION**

**(IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE CONSIDERED COMPLETE.)**

- 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. A check or money order made payable to **PRIVATE SCHOOL AID SERVICE** in the amount of **\$27.00**. *This is a non-refundable application fee.*
- 3.

**If you have filed a 2013 IRS Form 1040:**  
A complete photocopy of your **2013** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2013** W-2 Forms, **2013** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

**If you have not yet filed a 2013 IRS Form 1040:**  
A complete photocopy of your most recent Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules). **2013** W-2 Forms, **2013** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). *If this application is submitted after April 15, 2014, you must provide a copy of the 2013 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 **2013** YEAR-END Social Services statement (TANF, etc.). Food Stamp documentation, Housing Assistance documentation, Student Loans and/or grant documentation for parent's education, Social Security income statements showing **TOTAL AMOUNTS** received in **2013** for ALL members of the household.

An electronic recap of this written application is available for an additional \$5 fee. You must have an email address listed in Section A in order to receive the electronic recap. Please check this box and include an additional \$5 with your processing fee if you would like to receive an electronic recap.

**Checkout** →

<input type="checkbox"/> Non-Refundable Application Processing Fee .....	\$27.00
<input type="checkbox"/> Electronic Recap Fee (optional) .....	\$5.00
*Please make checks payable to PSAS	
<b>Total</b>	<input type="text"/>

**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 PRIVATE SCHOOL AID SERVICE to return this form and all attachments only to the schools and agencies named in Section C under contract with PSAS.

Parent/Guardian A \_\_\_\_\_ Date \_\_\_\_\_ Parent/Guardian B \_\_\_\_\_ Date \_\_\_\_\_

This Student Aid Form (SAF), all attachments and an analysis of your SAF are sent only to the school(s) or agencies contracting with PSAS. **You will not receive results from PSAS.** No other agency will see or receive any information about this application or its attachments.

**Mail completed application and photocopies of all documentation to:**  
**PRIVATE SCHOOL AID SERVICE, P.O. BOX 89434, CLEVELAND, OH 44101-6434**  
Questions? Call: (440) 892-4272 ■ Copyright © 2014 Private School Aid Service

*Keep a copy of this completed application and all documentation for your records. For more comprehensive instructions visit [www.psas.org/instructions](http://www.psas.org/instructions).*

## 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 the question does not apply to you, please write "Not Applicable" or "N/A".** 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 H. If you provide your email address to PSAS, it will be used for application related communication only. Your email address will also be provided to the organizations you list in Section C as part of your application. Your email address will not be shared with any other third party.

**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 date of birth and 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 (**2015-2016**); the amount you feel you can pay toward tuition yearly, and the amount of tuition charged per student per year.

If "No" is checked for a student listed in Section C, that student will not be considered for tuition assistance. For all additional dependents, use a separate sheet.

**NOTE:** The information regarding tuition charged per student assists PSAS in making the most equitable analysis of your ability to pay for private education. If you are unsure, please estimate.

### D Household Information

**ITEM 1:** Enter total number of individuals living in the household. Include any college students claimed on the tax return. Do not include children who have moved out of the home. Include all family members dependent on and residing with the parent listed in Section A.

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

### E Single, Divorced, Remarried, or Separated Parents

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

**If the date of separation took place in the year 2013, PSAS will require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2013. Be sure to estimate the income in Section F for 2014.**

**ITEM 5:** Indicate who is responsible for tuition and what percentage for the dependents listed in Section C. List the total amount of child support actually received by custodial parents listed in Sections A & B. List the total amount received and the total amount paid for **2013**.

### F Taxable Income (Answers in US\$ ONLY)

List all actual amounts for **2013** and estimated amounts for **2014**.

**ITEM 1:** Enter the total number of exemptions you claimed on your **2013** IRS Form 1040, 1040A, or 1040EZ.

**ITEM 2:** Enter the total **2013** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of **2013** W-2 forms and/or **2013** 1099 forms from all employers.

**ITEM 3:** Enter the total **2013** taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION B. Attach all copies of **2013** W-2 forms and/or **2013** 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 **2013**, you must also fill out Section K of this application. (See **2013 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 2013.** (See **2013 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 **2013 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 **2013 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 **2013 1040 line 61, or 1040A line 35.**)

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

**ITEM 9b:** Enter the total amount of Charitable Contributions as reported on Schedule A, line 19 of your IRS Form 1040 (attach Schedule A).

## G Assets and Investments

**ITEM 10:** List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

**ITEM 11:** List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

**ITEM 12:** List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts. List total amount contributed in **2013** for Item 12a.

**ITEM 13:** Answer Items 13a and 13b for any and all investment real estate (not including the family's primary residence), if applicable. **Do not list the value of your home.** Second homes, rental properties, and land contracts should be included.

**ITEM 14:** If you own a business, check the Yes box and answer Items 14a and 14b. If you have not filed your **2013** tax return, complete Section H of this application.

**ITEM 15:** If you own a farm, check the Yes box and answer Items 15a and 15b. If you have not filed your **2013** tax return, complete Section H of this application.

## H Business Income

**Provide 2013 Business Income Estimates if you have not filed your 2013 Tax Return.**

**ITEM 16:** List estimated total GROSS business income for **2013**.

**ITEM 17:** List estimated total NET taxable business income/loss for **2013**.

**ITEM 18:** List the total amount paid by business in **2013** for home rent or mortgage.

**ITEM 19:** List the total amount paid by business in **2013** for personal automobile.

**ITEM 20:** List the total amount of personal expenses paid by business in **2013** that do not fall into one of the categories above.

**ITEM 21:** List total amount of estimated rental income received in **2013**.

## I Non-Taxable Income (Answers in US\$ ONLY)

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. If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2013** for all recipients in the household for the following: Cash Assistance (Welfare/AFDC), 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 22: Child support:** Report total amount received for **2013** for all children in the household.

**ITEM 23: Cash Assistance (Welfare or AFDC):** Report total amount received for **2013**.

**ITEM 24: Food Stamps (SNAP):** Report total amount received for **2013**. Do not combine with TANF or Medicaid.

**ITEM 24a:** Did you receive Medicaid in **2013**?

**ITEM 25: Social Security benefits:** Report the total non-taxable (SSA/SSD, etc.) amount received in **2013** for all recipients in household.

**ITEM 25a: Social Security benefits:** Report the total non-taxable (SSI ONLY) amount received in **2013** for all recipients in household.

**ITEM 26: Student loans and/or grants:** Report the total amount received in **2013** 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 **2013**.

**ITEM 27: Housing assistance:** Report the total amount received for **2013**. 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 28: Other non-taxable income:** Report all additional non-taxable income received in **2013** including: Working for cash, Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); adoption and/or foster care subsidy, or any other benefit or income not subject to taxation by any government (Refugee Assistance, etc.). Identify source(s) in Section L.

**ITEM 28a: Any and all Military/VA Benefits and/or Compensation:** Provide your Leave and Earnings Statement (if applicable) and report the total amount received for **2013** of food and other living allowances paid to members of the military, veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.), VA Educational Work-Study, etc. Identify source(s) in Section L.

**ITEM 29: Loans/Gifts received from friends or relatives:** Report the total amount received in **2013**.

**ITEM 30: Total non-taxable income for 2013:** Add together Items 22-29.

## J Housing Expenses

**ITEMS 31 and 32:** If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

**ITEM 32c:** Indicate whether you are current on your monthly rental payment and if not, what the actual amount was that you paid in **2013**.

**ITEM 33a:** 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 33b:** Check with your lending institution and enter the amount still owed, including second mortgages.

**ITEM 33d:** Indicate whether you are current on your monthly mortgage payment and if not, what the actual amount was that you paid in **2013**.

## K 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 and also include a letter of explanation with this application.

## L Explanation

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

## M Certification, Authorization, and Documentation Requirements

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

## REQUIRED DOCUMENTATION

### If you have filed your 2013 IRS Form 1040:

You must submit photocopies of all pages of your **2013** Federal Tax Return Form 1040, 1040A or 1040EZ (as filed with the IRS, with all Schedules, **2013** W-2 Forms, **2013** 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 2013 IRS Form 1040:

You must submit photocopies of all **2013** W-2 Forms, **2013** 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, 2014, you must provide a copy of the 2013 Extension for Filing Request, as approved by the IRS.***

### If you are an Independent Contractor or self-employed and have not filed your 2013 IRS form 1040:

You must complete Section H 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), **2013** W-2 Forms, **2013** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). ***If this application is submitted after April 15, 2014, you must provide a copy of the 2013 Extension for Filing Request, as approved by the IRS.***

### If you receive non-taxable income:

You must submit photocopies of your **2013** YEAR-END (01/01/13 - 12/31/13) 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 **2013** for ALL members of the household. If you list any total for line 28, you must identify source(s) in Section L.

**IF YOU EARNED INCOME OUTSIDE THE US, PROVIDE ALL DOCUMENTATION OF INTERNATIONAL INCOME.**

**Archdiocese of Galveston-Houston  
Catholic Elementary Schools**

**School Code List**

SCHOOL CODE	SCHOOL NAME	CITY
4720	St. Joseph School	Baytown
4721	Sacred Heart School - Conroe	Conroe
4722	Sacred Heart School - Crosby	Crosby
4723	True Cross School	Dickinson
4757	Our Lady of Fatima - Galena Park	Galena Park
4724	Holy Family Catholic School	Galveston
4725	Our Lady of Lourdes School	Hitchcock
4740	Assumption Catholic School	Houston
4700	Corpus Christi	Houston
4701	Duchesne Academy - Lower School	Houston
4702	Duchesne Academy - Middle School	Houston
4703	Holy Ghost School	Houston
4704	John Paul II School	Houston
4758	Our Lady of Guadalupe	Houston
4756	Our Lady of Mt. Carmel	Houston
4760	Queen of Peace	Houston
4705	Regis School	Houston
4761	Resurrection	Houston
4706	St. Ambrose School	Houston
4707	St. Anne School - Houston	Houston
4762	St. Augustine	Houston
4708	St. Catherine School	Houston
4709	St. Cecilia	Houston
4764	St. Christopher	Houston
4710	St. Clare of Assisi School	Houston

SCHOOL CODE	SCHOOL NAME	CITY
4711	St. Elizabeth Ann Seton School	Houston
4712	St. Francis de Sales School	Houston
4765	St. Francis of Assisi	Houston
4713	St. Jerome School	Houston
4766	St. Mary of the Purification	Houston
4714	St. Michael School	Houston
4767	St. Peter the Apostle	Houston
4715	St. Rose of Lima School	Houston
4716	St. Theresa School - Houston	Houston
4717	St. Thomas More School	Houston
4718	St. Vincent de Paul School	Houston
4726	St. Mary Magdalene School	Humble
4727	St. Martha School	Kingwood
4728	St. Mary School	League City
4769	St. Pius V	Pasadena
4729	St. Helen School	Pearland
2353	Our Lady Queen of Peace School	Richwood
4732	Holy Rosary School	Rosenberg
1903	Northwoods Catholic School	Spring
4733	St. Edward School	Spring
4734	St. Laurence School	Sugar Land
4738	St. Theresa School - Sugar Land	Sugar Land
4735	Our Lady of Fatima - Texas City	Texas City
1845	St. Anthony of Padua School	The Woodlands
4736	St. Anne School - Tomball	Tomball

**LIST SCHOOL CODE IN SECTION C**