



Financial Aid Application 2023-2024 School Year

You will need the following supporting documentation before you begin: **You must submit all the below documentation with the application.**

- Most recently filed federal taxes **If you cannot obtain a copy, please request a 4506 form from the office and submit with the \$43 check made payable to "United State Treasury".*
- Most recent W-2's received by all Parents/Guardians
- Two most recent pay stubs of jobs that Parents/Guardians currently hold
- All documentation that establishes how much miscellaneous monthly or yearly income you currently receive (i.e. welfare, food stamps, unemployment, worker's compensation)
- All corporate, partnership or if any member of the household owns 20% or more interest in a trust
- Other documentation (recent utility bills, daycare expenses, etc.) are required

SECTION A: Parent/Guardian Information

Parent/Guardian #1	<p>Name:</p> <p>Year of Birth:</p> <p>Phone #:</p> <p>Email:</p> <p>Relationship to student: Parent Stepparent Guardian</p> <p>Work Status: Employed Unemployed Retired Self Employed Student Homemaker Temporarily Disabled Permanently Disabled</p>
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Parent/Guardian #2	<p>Name:</p> <p>Year of Birth:</p> <p>Phone #:</p> <p>Email:</p> <p>Relationship to student: Parent Stepparent Guardian</p> <p>Work Status: Employed Unemployed Retired Self Employed Student Homemaker Temporarily Disabled Permanently Disabled</p>
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SECTION B: Household Information

Parent/Guardian #1		
Street:		
City:	State:	Zip Code:
Parent/Guardian #2 (if different from above)		
Street:		
City:	State:	Zip Code:

SECTION C: List all jobs held by Parent(s)/Guardian(s) Since January 1, 2022 even if no longer at this job

If Parent(s)/Guardian(s) have had more than four jobs since January 1, 2022, please attach an additional sheet to this application.

Job #1	Whose Job? P/G #1 or P/G #2	Employer	Current? Yes or No	2022 Wages (line 1 of your most recent W-2) \$	2023 Estimated wages \$
Job #2	Whose Job? P/G #1 or P/G #2	Employer	Current? Yes or No	2022 Wages (line 1 of your most recent W-2) \$	2023 Estimated wages \$
Job #3	Whose Job? P/G #1 or P/G #2	Employer	Current? Yes or No	2022 Wages (line 1 of your most recent W-2) \$	2023 Estimated wages \$
Job #4	Whose Job? P/G #1 or P/G #2	Employer	Current? Yes or No	2022 Wages (line 1 of your most recent W-2) \$	2023 Estimated wages \$

SECTION D: List Business, Farm, Corporation, Partnership, Trust and Miscellaneous Income since January 1, 2022

If Parent(s)/Guardian(s) have had more than two businesses since January 1, 2022, please attach an additional sheet to this application.

Business #1	Business Name	Still Operating?	% owned	Type of Business Proprietorship Partnership Corporation Farm
	2022 Actual Net Profit	2022 Actual Depreciation	2023 Estimated Net Profit	
	\$	\$	\$	
Business #2	Business Name	Still Operating?	% owned	Type of Business Proprietorship Partnership Corporation Farm
	2022 Actual Net Profit	2022 Actual Depreciation	2023 Estimated Net Profit	
	\$	\$	\$	

SECTION E: Other Monthly Income

Welfare Income	Food Stamps	Parent	Social Security Dependents under 19	Elderly Dependents	Child Support
\$	\$	\$	\$	\$	\$
Alimony	Miscellaneous Monthly Income Taxable Non-Taxable		Types of Miscellaneous Income (circle all that apply) Housing Allowance Veteran Benefit Annuity Insurance Retirement		
\$	\$	\$			

SECTION F: Other Yearly Income

2022 Interest & Dividends	Yearly Worker's Compensation Actual 2022 Estimated 2023		Yearly Unemployment Actual 2022 Estimated 2023	
\$	\$	\$	\$	\$
Miscellaneous Monthly Income 2022 Lump Sum Recurring Yearly		Types of Miscellaneous Income (circle all that apply) Royalties Inheritance Insurance Winnings Capital Gains Business Income not included in Section 4 Assistance from Friends/Relatives		
\$	\$			

SECTION G: Rent Expenses

SECTION H: Yearly Energy Expenses (renter's and homeowner's)

Monthly Rent	Yearly Renters' Insurance		Electricity	Gas, Oil, Coal	Water, Sewage
\$	\$		\$	\$	\$

SECTION I: Assets and Expenses - Home

Year of Purchase	Purchase Price	Improvements/ Additions	Current Market Value	Amount owed on Home Loans/Mortgages (List total of all mortgages for this property)	Monthly Mortgage Payment
	\$	\$	\$	\$	\$
2022 Property Taxes	2022 Home Insurance	Type of Dwelling (Single Family or Multi - Family)	2022 Rental Income (if not a single family dwelling)	2022 Rental Expenses (if not a single family dwelling)	
\$	\$		\$	\$	

SECTION J: Assets and Expenses – Real Estate other than Home

Number of Properties	Purchase Price of All Properties	Cost of Improvements/ Additions	Current Market Value	Amount owed for all Properties
	\$	\$	\$	\$
Total Monthly Loan/Mortgage Payment	2022 Gross Property Income	2022 Gross Property Expenses	Type of Properties (Choose one or more)	
\$	\$	\$	Recreational Investment Other Business Rental Farm	

SECTION K: Assets and Debts – Automobiles

# of Vehicles (own)	Total Current Market Value	Total Debt	# of Vehicles (leased)	Total Monthly Lease
	\$	\$		\$
Yearly Insurance cost for all Vehicles	Make of Primary Vehicle		Make of Secondary Vehicle	
\$				

SECTION L: Assets – Recreational Vehicles/Boats

SECTION M: Assets – Cash, Stocks, Etc.

Value	Debt		Checking, Savings, Cash, CD's	Stocks, Securities, Bonds, Mutual Funds
\$	\$		\$	\$

SECTION N: Assets – Retirement Plans

	2022 Contribution - Household	2022 Contribution - Employer	Total Current Value
Self Managed (IRA, SEP, etc.)	\$	\$	\$
Other Managed (401K, etc.)	\$	\$	\$

SECTION O: Medical Expenses

	Payments made in 2022	Current Medical Debt	Annual Insurance Premiums
Medical/Dental	\$	\$	\$
Prescription Drugs	\$	\$	\$
Prescription Eyewear	\$	\$	\$
How much do employers pay for Medical? All Some None			
How much do employers pay for Dental? All Some None			

SECTION P: Alimony and Child Support Payments

# of Children Supported	Child Support Paid to Others in 2022	Estimated Support Payments in 2023	Alimony Paid to Others in 2022	Estimated Alimony Payments in 2023
	\$	\$	\$	\$

SECTION Q: Daycare and/or Elderly Care Expenses (include summer camp and before/after school care expenses)

	Name	Age	2022 Payments	Estimated 2023 Payments
Dependent #1			\$	\$
Dependent #2			\$	\$
Dependent #3			\$	\$

SECTION R: Charitable Giving (list your three largest contributions)

	Name of Charity	2022 Contributions
Charity #1		\$
Charity #2		\$
Charity #3		\$

SECTION S: Miscellaneous Debts (do not list debt on home or property, medical debts, debt for cars, boats or other vehicles)

Credit Cards	Bank Loans (do not include home mortgage)	Loan Companies	Loans – Friends or Relatives
\$	\$	\$	\$
Education - Dependents	Education – Parent(s)/Guardian(s)		Other Debt
\$	\$	\$	

SECTION T: Special Circumstances

- Your Household is expecting another child this year
- You are in the process of a divorce or separation
- Your spouse will not cooperate in completing this form
- There has been a recent death in the household
- A household member has been recently diagnosed as severely ill
- A household member has a problem (addictions, mental, illness, etc.) that is causing financial stress for the family
- A Parent/Guardian is widowed
- You are a non-custodial parent who is required by your school to complete this financial aid form in addition to your ex-spouse, who is also completing this form
- Your household does not pay rent or mortgage
- Your household is not required to file a 1040 tax form
- International student
- A Parent/Guardian is a member of the military or clergy

SECTION U: Contributions to Education (2023-2024)

How much (in your opinion) can Parent(s)/Guardian(s) contribute toward the tuition of all dependents in this household next year?	\$
How much per year is a non-custodial parent ordered by law to contribute toward the education of those applying for financial aid with this form?	\$
How much will any other sources contribute toward the education of those applying for financial aid with this form?	\$

SECTION V: List all Tuition Charging Schools, including Colleges and Public Universities

Instructions: Please complete for all dependents attending school.			
	Name of School	City	Estimated Tuition Parents will be paying in 2023-2024
A			
B			
C			
D			
E			
F	Public Grade School, High School or Home School.		

G	Not Attending any School (daycare is not considered a school)		
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SECTION W: List all Dependents in the Household; Do not include Parent(s)/Guardian(s)-
If you have more than 5 dependents please attached an additional sheet.

	Last Name	First Name	Birth Year	Grade in '23-'24	A Foster Child (ward of the state?)	School attending from Section 22
#1					Y or N	A B C D E F G
#2					Y or N	A B C D E F G
#3					Y or N	A B C D E F G
#4					Y or N	A B C D E F G
#5					Y or N	A B C D E F G

	Dependent Earnings in 2022	Dependent Current Savings	Amount Dependent can contribute to education from earnings for school year '23-'24	Expenses – Bus, Books, Uniforms, fees, Etc.
#1				
#2				
#3				
#4				
#5				

If dependents will be in school or preschool during the 2023-2024

	Boarding at School, not home?	Returning to School attended last year?	Attending School Half Days?	Days Per Week in School?
#1	Yes or No	Yes or No	Yes or No	
#2	Yes or No	Yes or No	Yes or No	
#3	Yes or No	Yes or No	Yes or No	
#4	Yes or No	Yes or No	Yes or No	
#5	Yes or No	Yes or No	Yes or No	

SECTION X: Application Processing Fees

There is \$25 per application processing fee. Please send in a check, cash or fill out the below credit card information.

Payment Method: Check Money Order Cash Visa MasterCard Amex Discover

Credit Card Number: _____

Expiration Date: ____/____

Name as it appears on the credit card: _____

SECTION Y: Statements and Signatures

I declare that the information on this form is to the best of my knowledge, correct and complete. I authorize the transmittal of the information on this form to Montessori Academy. I agree, if requested, to send additional information to support statements on this form. If payment is made by credit card, I authorize Montessori Academy to process my credit card. If payment is made by check, money order or cash it will be paid at the same time as the application is submitted. This form must be signed by each Parent/Guardian.

Parent/Guardian #1 Signature: _____.

Parent/Guardian #1 Signature: _____.

For office Use Only:

Date Received: _____

Date Payment Received: _____ Payment Type: _____

Date Reviewed: _____

Date Determination Awarded: _____

Amount of Financial Aid: \$ _____

School Head Signature: _____

Date: _____