

# Saints Simon and Jude School Catholic Education Fund

Student Aid Form • 2021 – 2022

• IMPORTANT: Print clearly and neatly •

## **A** PARENT, GUARDIAN or OTHER ADULT RESPONSIBLE FOR TUITION

Check one:  Father  Mother  Stepfather  Stepmother  Other Adult

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Last Name First Name MI

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Social Security Number Age Home Phone

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Address Apt. # County of Residence

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City State Zip

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Cell Phone Work Phone E-mail Address

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Employed by How Long?

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

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Last Name First Name MI

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Social Security Number Age Home Phone

---

Address Apt. # County of Residence

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City State Zip

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Cell Phone Work Phone E-mail Address

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Employed by How Long?

If you are self-employed, check this box and refer to Section K of this form.



# F TAXABLE INCOME - The 2020 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 2020	Estimate 2021
1. Total number of exemptions claimed on Federal Income Tax form:	_____	_____
2. Parent/Guardian A total taxable income from W-2 wages. (Total income for Parent A only)	\$ _____	\$ _____
3. Parent/Guardian B total taxable income from W-2 wages. (Total income for Parent B only)	\$ _____	\$ _____
4. Net business income* from self-employment, farm, rentals, and other businesses. (*Go to Section K) (Attach Schedules C, E, and/or F from your IRS 1040) <b>See 2019 1040 lines 12, 17, and 18</b>	\$ _____	\$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. <b>See 2019 1040 lines 8a, 9a-11, 13, 14, 15b, 16b, 19-21 See 2012 1040 A lines 8a-14b</b>	\$ _____	\$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040EZ. <b>See 2019 1040 line 36 or 1040 A line 20</b>	\$ _____	\$ _____
7. Total "Adjusted Gross Income" as reported on your IRS 1040, 1040A, or 1040EZ <b>See 2019 1040 line 37 or 1040 A line 21</b>	\$ _____	\$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A or 1040EZ. <b>See 2019 1040 line 60 or 1040 A line 37</b>	\$ _____	\$ _____
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 **1/1/20-12/31/20** 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 2020? <input type="checkbox"/> Yes <input type="checkbox"/> No	
13. Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)	\$ _____ per year
a. Social Security income ( <b>SSI ONLY</b> ) total received in 2020 * (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 2020	\$ _____ per year
b. total used for household expenses	\$ _____ per year
15. Housing Assistance (Sec. 8, HUD, etc.)	\$ _____ per year
a. Religious Housing Assistance total received in 2020 (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 2020	\$ _____ per year

# H HOUSING INFORMATION

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

22. 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 the monthly mortgage payment? \$ \_\_\_\_\_ per month

# I ASSETS & INVESTMENTS (AS OF 12/31/20)

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

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

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

26. If you own real estate other than your primary residence,

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

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

27. 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? \$ \_\_\_\_\_

28. 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:

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

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Parent/Guardian A: \_\_\_\_\_ SS#: \_\_\_\_\_  
Print Name

# K

## Business Income Estimate (2020 Totals)

(If you have not filed your 2020 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? (DO NOT LEAVE BLANK)	\$ _____	\$ _____	\$ _____
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

## Documentation Requirements

A complete photocopy of your **2020** Form 1040, 1040A, or 1040EZ (as filed with the IRS, including all Schedules). **2020** W-2 Forms, **2020** 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s).

**If you have not filed the current year tax return please provide a copy of your last return.**

Make a copy of the form for your files and mail a copy to:

**SS. Simon and Jude Catholic Education Fund**  
**Attn: Sister Regina Elinich, IHM**  
**6 Cavanaugh Court**  
**West Chester, PA 19382**

Please contact Sister Regina Elinich, IHM ([srelinich@simonandjude.org](mailto:srelinich@simonandjude.org) or 610-696-5249) if you have any questions.

Parent / Guardian A \_\_\_\_\_

Date: \_\_\_\_\_

Parent / Guardian B \_\_\_\_\_

Date: \_\_\_\_\_