

Jewish Education Agency

Financial Aid Application

The Jewish Education Agency provides Financial Aid on a basis of need to Jewish families whose children have been accepted into the Lil Goldman program. All information remains strictly confidential. Funds are limited and may be allocated quickly so it is prudent to apply in a timely manner.

The required documentation is outlined below and in the application. Please note: meeting the outlined deadlines is critical for consideration to receive financial aid.

Please turn in by July and/or before 1st day of school year.

Financial aid application and all supporting documents due for current and new applicants. Applicants with scanned copies of documentation may be emailed to: jacenda.anderson@lilgoldmanschool.org.

Sealed packets may also be returned to the front desk or Jacenda Anderson.

- **Application**
- **Copies of the last two years IRS Forms 1040, 1040A or 1040EZ.** If applicant and co-applicant file separately, include both tax returns.
- **Copies of last 2 year's W-2 wages and tax return** for applicant and co-applicant.
- **Copies of all supporting documents for household social security, income, welfare, child support, food stamps, workman's compensation and temporary assistance for needy families.**
- **Copies of supporting schedule if you have income from:**
 - Business – Schedule C, C-EZ (Form 1040) and form 4562 Depreciation and Amortization
 - Farm – Schedule F (1040) and form 4562 Depreciation and Amortization
 - Rental – Schedule E (1040)
 - S-Corporation – Schedule E (1040), 1120S, K-1 and form 8825
 - Partnership – Schedule E (1040) form 1065, K-1 and 8825
 - Estates and Trusts – Schedule E (1040), 1041, K-1 and 8825
- **Add a written explanation of unusual circumstances that have affected your financial situation this year.**

Need more information? Contact jacenda.anderson@lilgoldmanschool.org

Applicant & Co-Applicant Information

APPLICANT INFORMATION: Parent or Guardian

Name: _____
Last First Middle Initial

Permanent Address: _____
Street City State Zip Code

Date of Birth _____

Daytime Phone # _____ Evening Phone # _____

E-Mail Address _____

Employment Status: Full-time/Part-Time (less than 30 hrs per week)/Stay at Home (full-time family care)/Self-Employed/Disabled/Retired/Student (circle)

Relationship to Student(s): Father/Mother/Stepfather/Stepmother/Legal Guardian/Grandfather/Grandmother/Other (circle)

Current Marital Status: Married (if current marital status is married co-applicant information is required)/Single/Divorced/Separated/Widowed (circle)

Occupation: _____ Employer: _____

Place of Worship _____

Religious Affiliation: Baptist/Catholic/Jewish/Muslim/Other Christian/Other Non-Christian (circle)

CO-APPLICANT INFORMATION: Parent or Guardian

Name: _____
Last First Middle Initial

Permanent Address: _____
Street City State Zip Code

Date of Birth _____

Daytime Phone # _____ Evening Phone # _____

E-Mail Address _____

Employment Status: Full-time/Part-Time (less than 30 hrs per week)/Stay at Home (full-time family care)/Self-Employed/Disabled/Retired/Student (circle)

Relationship to Student(s): Father/Mother/Stepfather/Stepmother/Legal Guardian/Grandfather/Grandmother/Other (circle)

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Occupation: _____ Employer: _____

Place of Worship _____

Religious Affiliation: Baptist/Catholic/Jewish/Muslim/Other Christian/Other Non-Christian (circle)

Complete this section for ALL children in household. The grade level entered should be for the upcoming _____ school year.

CHILD'S INFORMATION

Name _____
Last First Middle Initial

Age _____ Annual Tuition _____

School _____ Financial Aid Yes ___ No ___

Grade Entering _____ If yes, how much _____

How much do you estimate you and/or your spouse can pay toward this child's tuition **annually**? _____

Preschool: Number of days attending _____ Hours attending _____

Camp: # of weeks attending _____ # days/week attending _____ Hours attending _____

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Last First Middle Initial

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Camp: # of weeks attending _____ # days/week attending _____ Hours attending _____

Personal Financial Statement
 as of: _____

Name: _____

<u>Assets</u>	<u>Amount in Dollars</u>
	\$
Cash - checking accounts	-
Cash - savings accounts	-
Certificates of deposit	-
Securities - stocks / bonds / mutual funds	-
Notes & contracts receivable	-
Life insurance (cash surrender value)	-
Personal property (autos, jewelry, etc.)	-
Retirement Funds (eg. IRAs, 401k)	-
Real estate (market value)	-
Other assets (specify)	-
Other assets (specify)	-
	<u>\$</u>
Total Assets	<u>-</u>
<u>Liabilities</u>	<u>Amount in Dollars</u>
	\$
Current Debt (Credit cards, Accounts)	-
Notes payable (describe below)	-
Taxes payable	-
Real estate mortgages (describe)	-
Other liabilities (specify)	-
Other liabilities (specify)	-
	<u>\$</u>
Total Liabilities	<u>-</u>
Net Worth	<u><u>\$ -</u></u>

Details

1. ASSETS - Details

Notes and Contracts held

From Whom Owing	Balance Owing	Original Amount	Original Date	Monthly Payment
	\$ -	\$ -		\$ -

Securities: stocks / bonds / mutual funds

Name of Security	Number of Shares	Cost	Market Value	Date of Acquisition
		\$ -	\$ -	

Stock in Privately Held Companies

Company Name	No. of shares	\$ Invested	Est. Market Value
		\$ -	\$ -

Real Estate

Description / Location	Market Value	Amount Owing	Original Cost	Purchase Date
	\$ -	\$ -	\$ -	

2. LIABILITIES - Details

Credit Card & Charge Card Debt

Name of Card / Creditor	Amount Due
	\$ -

Notes Payable (excluding monthly bills)

Name of Creditor	Amount Owning	Original Amount	Monthly Payment	Interest Rate
	\$ -	\$ -	\$ -	

Mortgage / Real Estate Loans Payable

Name of Creditor	Amount Owning	Original Amount	Monthly Payment	Interest Rate
	\$ -	\$ -	\$ -	

Income:

Net Monthly Income (after taxes) \$ _____
 Bonus and Commission _____
 Interest and Dividends _____
 Rental Income _____
 Royalties _____
 Total Other (child support, alimony, Social Security Benefits) _____
 Income Tax Refund _____

Total Income \$ _____

Expense:

Mortgage Payment (principal & interest only)/Rent \$ _____
 Secondary Mortgage (ie. Car, boat, RV, etc) _____

 Food _____
 Utilities _____
 Telephone _____
 Gasoline – distance from work _____
 Insurance (ie. Life, car, property) _____
 Charitable Contributions _____
 Travel Expenses _____
 Clothing Expenses _____
 Child care (other than Lil Goldman) _____
 Entertainment _____
 Child Support _____
 Savings _____
 Business Expenses _____
 College Tuition (if presently enrolled) _____
 College Loans _____
 Total Other (detail on a separate page if necessary) _____

Total Expenses \$ _____

Cash Flow Surplus/(Deficit) \$ _____

I am the Co-Maker, endorser, or guarantor on the following loans and obligations:

Description of Contingent Loans	Balance/Payment	To Whom Owed
_____	_____	_____
_____	_____	_____

I/We certify that the information contained herein is true, correct, and complete to the best of my/our knowledge.

Signed: _____

Date: _____