



# Parents' Financial Statement

## Household Information

### Parent/Guardian Information

Enter names exactly as they appear on tax/official forms.

#### Parent/Guardian A

Parent/Guardian A will be our primary contact for correspondence.

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_ Suffix \_\_\_\_\_

Physical Address (No P.O. Boxes) \_\_\_\_\_ Suite/Apt. No \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Country \_\_\_\_\_ Birthdate (mm/dd/yyyy) \_\_\_\_\_ Gender  Male  Female  Nonbinary

Email \_\_\_\_\_ Phone \_\_\_\_\_  Home  Work  Cell

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

Years with Employer \_\_\_\_\_

Job Title \_\_\_\_\_

If Parent/Guardian A has more than one job, explain: \_\_\_\_\_

\_\_\_\_\_

Personal Circumstances (select all that apply)

- Expecting Child
- Recently Divorced or Separated
- Widowed
- Non-Custodial Guardian
- Military (Active or Veteran) or Clergy Member Faculty
- or Staff at the School

#### Parent/Guardian B

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_ Suffix \_\_\_\_\_

Address \_\_\_\_\_ Suite/Apt. No \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Country \_\_\_\_\_ Birthdate (mm/dd/yyyy) \_\_\_\_\_ Gender  Male  Female  Nonbinary

Email \_\_\_\_\_ Phone \_\_\_\_\_  Home  Work  Cell

Occupation \_\_\_\_\_

Employer \_\_\_\_\_

Years with Employer \_\_\_\_\_

Job Title \_\_\_\_\_

If Parent/Guardian B has more than one job, explain: \_\_\_\_\_



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## Other Parent

If the Applicant(s) has another biological or legal (adoptive) Parent/Guardian not listed above, complete this section.

Indicate the relationship between the Parents/Guardians:  Never Married  Divorced  Separated, no court action  Separated, legally

Year of divorce/separation (yyyy) \_\_\_\_\_ Is there a joint custody agreement?  Yes  No

Other Parent's/Guardian's Full Name \_\_\_\_\_

Address \_\_\_\_\_ Suite/Apt. No \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

## Applicant Information

Complete this section for each child applying to a Partner School for Financial Aid. Enter names exactly as they appear on tax/official forms.

### Applicant A

First Name \_\_\_\_\_ Middle \_\_\_\_\_ Last Name \_\_\_\_\_

Birthdate (mm/dd/yyyy) \_\_\_\_\_ Gender  M  F  NB Last 4 digits of Social Security # \_\_\_\_\_

Current Grade \_\_\_\_\_ Current School \_\_\_\_\_ Grade entering Fall 2023 \_\_\_\_\_

Lives with:  Parent/Guardian A & B  Parent/Guardian A  Parent/Guardian B  Other (identify) \_\_\_\_\_

### Applicant B

First Name \_\_\_\_\_ Middle \_\_\_\_\_ Last Name \_\_\_\_\_

Birthdate (mm/dd/yyyy) \_\_\_\_\_ Gender  M  F  NB Last 4 digits of Social Security # \_\_\_\_\_

Current Grade \_\_\_\_\_ Current School \_\_\_\_\_ Grade entering Fall 2023 \_\_\_\_\_

Lives with:  Parent/Guardian A & B  Parent/Guardian A  Parent/Guardian B  Other (identify) \_\_\_\_\_

### Applicant C

First Name \_\_\_\_\_ Middle \_\_\_\_\_ Last Name \_\_\_\_\_

Birthdate (mm/dd/yyyy) \_\_\_\_\_ Gender  M  F  NB Last 4 digits of Social Security # \_\_\_\_\_

Current Grade \_\_\_\_\_ Current School \_\_\_\_\_ Grade entering Fall 2023 \_\_\_\_\_

Lives with:  Parent/Guardian A & B  Parent/Guardian A  Parent/Guardian B  Other (identify) \_\_\_\_\_



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## Non-Applicant Dependent Information

Complete this section for all dependent individuals in your household who are NOT applying for Financial Aid at a Partner School. A dependent is identified as an individual—child or adult—for whom you provide at least 50% of their financial support each year. Include children for whom you provide support, even if the child does not live with you. If you have dependents who are not children, include them here. DO NOT add anyone to this section you have already identified as a Parent/Guardian or a Student Applicant.

### Non-Applicant Dependent 1

Full Name \_\_\_\_\_ Birthdate (mm/dd/yyyy) \_\_\_\_\_  
Gender M / F / NB Current Grade \_\_\_\_\_ Current School \_\_\_\_\_

### Non-Applicant Dependent 2

Full Name \_\_\_\_\_ Birthdate (mm/dd/yyyy) \_\_\_\_\_  
Gender M / F / NB Current Grade \_\_\_\_\_ Current School \_\_\_\_\_

### Non-Applicant Dependent 3

Full Name \_\_\_\_\_ Birthdate (mm/dd/yyyy) \_\_\_\_\_  
Gender M / F / NB Current Grade \_\_\_\_\_ Current School \_\_\_\_\_

## School Selection

Applicant	Partner Code (if known)	School Name	State	At this School, the Student Applicant will be...Day, Half Day, Boarding or International Boarding? Currently enrolled?



# Parents' Financial Statement

## Family Income

### Basic Tax Information

Have you completed your 2023 Tax Return?  Yes  No (if no, select Estimated)

Income filing status for 2023 (circle one):  Single  Married, Filing Jointly  Married, Filing Separately

Head of Household  Did Not File  Qualifying Widow(er) with Dependent Child

If you filed or will file a Schedule A (Form 1040), what did you or will you report as your total itemized deductions? [Schedule A (Form 1040), line 17] \$ \_\_\_\_\_

What did you or will you pay in total federal taxes in 2023? [IRS Form 1040, line 24 minus Schedule 2, line 4) \$ \_\_\_\_\_

### Total Taxable Income

#### Salary and Wages

Total salaries and wages can be found in Box 1 of the W2 form given to you by your employer. If you have more than one W2, add the amount from each W2.

	2023	2024 Estimated
Salary and wages for Parent/Guardian A:	\$	\$
Salary and wages for Parent/Guardian B:	\$	\$

#### Dividends & Interest Income

Refer to your 1099-INT statement (or line 2b from your IRS Form 1040) for interest income and/or your 1099-DIV statement (or line 3b from your IRS Form 1040) for dividend income.

	2023	2024 Estimated
Total interest income:	\$	\$
Total dividends:	\$	\$

#### Adjustments to Income

	2023	2024 Estimated
Total adjustments reported [Schedule 1 (Form 1040), line 26]:*	\$	\$
Total IRA pre-tax payments [Schedule 1 (Form 1040), line 20]:	\$	\$
Total Keogh, Simplified Employee Pension (SEP), SIMPLE, or other qualified plan payments [Schedule 1 (Form 1040), line 16]:	\$	\$
Total deductible portion of self-employment tax [Schedule 1 (Form 1040), line 15]:	\$	\$
*Itemize other adjustments:		



# Parents' Financial Statement

## Other Taxable Income

Help text is provided online to help you determine the total of any other taxable income you may have. This includes income you received from pensions, annuities, rental properties, royalties, estates or trusts, household expenses paid in lieu of alimony, unemployment compensation benefits, capital gains, and taxable Social Security benefits. These amounts are all listed in the Income section on your IRS Form 1040.

Note: If you are a part of a Partnership or S-Corporation, you need to complete Section 7: Other Taxable Income (PFS question 7q).

	2023	2024 Estimated
Total other taxable income:	\$	\$

## Total Nontaxable Income

### Child Support Received

	2023	2024 Estimated
Child support received for ALL children:	\$	\$

### Social Security Benefits

	2023	2024 Estimated
Social Security benefits received by all members of your household:	\$	\$

## Other Nontaxable Income

Help text is provided online to help you determine the total of any nontaxable income you may have. This includes payments made to tax-deferred pension and savings plans as reported on W2 forms (box 12, labeled D, E, F, G, or H). They include qualified retirement plans (including 401k and 403 plans), pre-tax contributions to fringe benefits plans (such as a cafeteria or 125 plan), cash support, gifts, money paid to you (or to others on your behalf) by relatives or non-relatives, amount paid or provided by a separated or divorced spouse (in lieu of child support) to cover household expenses; value of allowances received for housing, food, and other living expenses as a member of the military or clergy; cash value of earned income credits, welfare benefits, veteran's benefits, and worker's compensation; income received from tax-exempt investments, income earned abroad, and other untaxed income/benefits not specified above.

	2023	2024 Estimated
Total other nontaxable benefits	\$	\$
Total other nontaxable income	\$	\$
Miscellaneous other nontaxable income	\$	\$



# Parents' Financial Statement

## Student Applicant Income

### Student Applicant Income

	Did Applicant file a 2023 Federal Tax Return?	2023	2024 Estimated
Applicant A _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	\$ _____
Applicant B _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	\$ _____
Applicant C _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	\$ _____

### Student Applicant Assets

Enter the total value of each Student Applicant's assets. Include Student Applicant's saving account(s), IRA, stocks, bonds, inheritances, trust funds, real estate, 529 savings plan accounts own by the student, cash value of annuities, and education insurance policies. Do NOT include life insurance policies, stamp/coin collections, or value of personal property held on behalf of the Student Applicant.

	Total Value	Itemize Assets
Applicant A _____	\$ _____	
Applicant B _____	\$ _____	
Applicant C _____	\$ _____	

## Family Assets and Debts

### Real Estate

	2023	2024 Estimated
If you pay RENT on the home you current live in, provide the TOTAL amount paid/will pay in rent for the entire year.	\$ _____	\$ _____

If you OWN the home you currently live in, provide the following information:

Purchase Year	Purchase Price	Present Market Value	Unpaid Principal on 1st Mortgage	Annual Payments on 1st Mortgage
	\$ _____	\$ _____	\$ _____	\$ _____

If you have a 2nd mortgage or home equity loan, provide the following information:

Unpaid Principal on 2nd Mortgage	Annual Payments on 2nd Mortgage	Describe the purpose of the 2nd mortgage or equity loan:
\$ _____	\$ _____	



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## Other Real Estate

If you own property other than your primary home, provide the following information for each property. If a property is used as a rental (Schedule E), report the income or loss on question 7q of the Other Taxable Income section. If you have a Schedule E and manage the rental property as a business, you will include the income/loss in questions 16-17 of the Business/Farm section of the PFS.

### Property 1

Address

Purpose/Use of Property

- Additional family income
- Vacation home/timeshare
- Other: \_\_\_\_\_
- Rental income
- Vacant land

Purchase Price

Present Market Value

Unpaid Principal on 1st Mortgage

Annual Total Payments on 1st Mortgage

\$

\$

\$

\$

### Property 2

Address

Purpose/Use of Property

- Additional family income
- Vacation home/timeshare
- Other: \_\_\_\_\_
- Rental income
- Vacant land

Purchase Price

Present Market Value

Unpaid Principal on 1st Mortgage

Annual Total Payments on 1st Mortgage

\$

\$

\$

\$

### Property 3

Address

Purpose/Use of Property

- Additional family income
- Vacation home/timeshare
- Other: \_\_\_\_\_
- Rental income
- Vacant land

Purchase Price

Present Market Value

Unpaid Principal on 1st Mortgage

Annual Total Payments on 1st Mortgage

\$

\$

\$

\$



# Parents' Financial Statement

## Vehicles

Provide the following information about all vehicles (cars, recreational vehicles, boats) owned or leased by your family.

### Vehicle 1

Type	Make	Model	Year
<input type="checkbox"/> car <input type="checkbox"/> boat <input type="checkbox"/> recreational vehicle			
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> own <input type="checkbox"/> lease <input type="checkbox"/> employer/business provided	\$	\$	

### Vehicle 2

Type	Make	Model	Year
<input type="checkbox"/> car <input type="checkbox"/> boat <input type="checkbox"/> recreational vehicle			
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> own <input type="checkbox"/> lease <input type="checkbox"/> employer/business provided	\$	\$	

### Vehicle 3

Type	Make	Model	Year
<input type="checkbox"/> car <input type="checkbox"/> boat <input type="checkbox"/> recreational vehicle			
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> own <input type="checkbox"/> lease <input type="checkbox"/> employer/business provided	\$	\$	

## Other Assets & Debts

### Bank Accounts

Total value of both Parents'/Guardians' checking and savings accounts (interest bearing and non-interest bearing):

\$ \_\_\_\_\_

### Investments

Total net value of all investments (stocks, bonds, mutual funds, and case value of whole life insurance policies owned by the Parents/Guardians):

\$ \_\_\_\_\_





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## Retirement Plans

Is there an employee retirement plan for Parent/Guardian A?  Yes  No Parent/Guardian B?  Yes  No

Total value of company managed retirement plans, including pensions, 401k, 403b or SEP plans: \$ \_\_\_\_\_

Total household contribution for any pension, IRA, or SEP plans held by Parents(s)/Guardian(s): \$ \_\_\_\_\_

Total value of any self-managed retirement plans, including IRAs: \$ \_\_\_\_\_

Total household contribution for any 401k or 403b plan held by the Parent(s)/Guardian(s) \$ \_\_\_\_\_

## Debts

Total consumer debt (total balances from all credit card purchases you have not reported elsewhere on the PFS): \$ \_\_\_\_\_

Total outstanding debt for:

- Past education of the Parent(s)/Guardian(s): \$ \_\_\_\_\_
- Any loans taken with a Loan Company: \$ \_\_\_\_\_
- Any loans taken from friends or relatives: \$ \_\_\_\_\_
- From interest-bearing medical expenses: \$ \_\_\_\_\_

Total other outstanding debt: \$ \_\_\_\_\_

## Family Income

Information provided in this section helps Schools better assess your full obligation to pay tuition and other educational expenses. Please be realistic about the amount you can contribute, keeping in mind that the primary responsibility for paying for your child's education lies with you.

## Educational Expenses

How many children (Applicants and non-applicant dependents) are/will be receiving support from you in 2023? \_\_\_\_\_

How many will attend tuition-charging institutions (childcare centers, schools, or colleges)? \_\_\_\_\_



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## Other Expenses

### Health Expenses

Do you have health insurance either through your employer or through the Affordable Care Act?  Yes  No

Do you carry health insurance through a business that you own?  Yes  No

Total amount you paid for health insurance premiums and plans: \$ \_\_\_\_\_

Total health expenses you paid out of pocket that were not reimbursed by insurance or nontaxable benefit accounts such as HSA, FSA, DCA, HSR, etc: \$ \_\_\_\_\_

### Child Support & Alimony Paid

	2023	2024 Estimated
Total amount you paid in child support for Applicant 1:	\$ _____	\$ _____
Total amount you paid in child support for Applicant 2:	\$ _____	\$ _____
Total amount you paid in child support for all other dependents:	\$ _____	\$ _____

Total amount you paid in alimony in 2023: \$ \_\_\_\_\_

What tax year did you begin making alimony payments? \_\_\_\_\_

### Additional Expenses

Total amount you paid in 2023 for utilities: \$ \_\_\_\_\_

Total amount of charitable contributions in 2023: \$ \_\_\_\_\_

Total amount you paid in 2023 for:

- Annual fee/club dues for charge more than \$250: \$ \_\_\_\_\_
- Camps and lessons for all members of your household: \$ \_\_\_\_\_
- Vacations for all members of your household: \$ \_\_\_\_\_

Total amount of additional/unusual expenses you incurred defined as acceptable: \$ \_\_\_\_\_



# Parents' Financial Statement

## Business/Farm

This information is only asked of families who report being a sole proprietor of or a partner in one or more businesses/farms. The PFS will ask you to complete this information for each business or farm you own. Do NOT combine information.

### Business Information

You will need to provide this information for each business/farm owned.

Owner(s)/partner(s) in business/farm: \_\_\_\_\_

Business/farm name: \_\_\_\_\_

Year business/farm operation began: \_\_\_\_\_ Business Type:  Sole Proprietorship  Partnership  S-Corporation

Address \_\_\_\_\_

City \_\_\_\_\_ State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Description of service or product: \_\_\_\_\_

### Business Income

If you are an owner/partner in more than one business/farm, provide the following for each business or farm you own.

Note: If you are a part of a Partnership or S-Corporation, you need to complete PFS section 7, Other Taxable Income (7q).

	2023	2024 Estimated
Gross receipts and sales:	\$	\$
Cost of goods sold and/or operations:	\$	\$
Other business/farm income:	\$	\$

### Business Expenses

If you are an owner/partner in more than one business/farm, provide the following for each business or farm you own.

	2023	2024 Estimated
Salaries/wages paid to you and your spouse:	\$	\$
Other wages:	\$	\$
Additional compensation:	\$	\$
Business property rent:	\$	\$
Business property mortgage:	\$	\$
Depreciation:	\$	\$
Other expenses (will need to explain):	\$	\$
Amount paid for self-employment tax:	\$	\$



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## Business Assets and Debts

If you are an owner/partner in more than one business/farm, provide the following for each business or farm you own.

### Business and/or Farm Assets

	2023	2024 Estimated
Current business/farm assets minus amounts reserved for bad debts:	\$	\$
Land and buildings (present market value):	\$	\$
Case reserve for depreciation:	\$	\$
Other capital assets of the business/farm:	\$	\$
Accounts receivable:	\$	\$
Other business/farm assets:	\$	\$

### Business and/or Farm Debts

	2023	2024 Estimated
Mortgage on land and buildings:	\$	\$
Debts on equipment and machinery:	\$	\$
Other business on farm debts:	\$	\$

## Other Information

This final section of the PFS is Other Consideration. Use the below space to provide any other information, explanation, or details you believe are pertinent to your family's situation when the School(s) consider your request for Financial Aid.