

# TUITION ADJUSTMENT APPLICATION

Separate Residences

2012 – 2013

This application can only be processed if accompanied by copies of your  
**Canada Revenue Agency 2010 Notice(s) of Assessment.**

## CONFIDENTIAL

### FAMILY INFORMATION

f \_\_\_\_\_

**Parent or Guardian 1** \_\_\_\_\_  Financially Responsible

Mother       Father       Step-Mother       Step-Father       Female Guardian       Male Guardian  
 Married       Common Law       Separated       Divorced       Single       Disabled

Address \_\_\_\_\_

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

Occupation \_\_\_\_\_ Employer \_\_\_\_\_

Full Time       Part Time      How many hours per week? \_\_\_\_\_

**Parent or Guardian 2** \_\_\_\_\_  Financially Responsible

Mother       Father       Step-Mother       Step-Father       Female Guardian       Male Guardian  
 Married       Common Law       Separated       Divorced       Single       Disabled

Address \_\_\_\_\_

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

Occupation \_\_\_\_\_ Employer \_\_\_\_\_

Full Time       Part Time      How many hours per week? \_\_\_\_\_

### Children in Family

List from OLDEST to YOUNGEST

### Grade

Sep 2012

1 \_\_\_\_\_  Applying to VWS       Currently enrolled at VWS.  
 Familiar Name (& Surname If different) (OLDEST)

Lives with:       Parent/Guardian 1       Parent/Guardian 2       Homestay       Other \_\_\_\_\_

2 \_\_\_\_\_  Applying to VWS       Currently enrolled at VWS.  
 Familiar Name (& Surname If different)

Lives with:       Parent/Guardian 1       Parent/Guardian 2       Homestay       Other \_\_\_\_\_

3 \_\_\_\_\_  Applying to VWS       Currently enrolled at VWS.  
 Familiar Name (& Surname If different)

Lives with:       Parent/Guardian 1       Parent/Guardian 2       Homestay       Other \_\_\_\_\_

4 \_\_\_\_\_  Applying to VWS       Currently enrolled at VWS.  
 Familiar Name (& Surname If different) (YOUNGEST)

Lives with:       Parent/Guardian 1       Parent/Guardian 2       Homestay       Other \_\_\_\_\_

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## **TUITION ADJUSTMENT PROGRAM**

### **Meeting the Needs of Every Family**

As a community, we are burdened by misconceptions about tuition and the process of adjusting tuitions. The system we currently use is a *fixed* tuition system. This provides a stable financial base which, coupled with grants, gifts, and fundraising, comprises our operating budget. We have created the Tuition Adjustment (TA) program with its process of adjusting tuition in order to accommodate those families who could not afford to pay the published tuition rate. A common misconception is that this program is the same as financial aid or tuition assistance. The reality is that we do *not* take from those that *'can'* and give to those that *'cannot'*. In fact, by refusing to meet the needs of those who are eligible for adjusted tuitions, we would place an even greater burden on the *'can'* families by removing from our revenues the amounts that the *'cannots'* contribute through reduced tuition and grants.

The money that we pay to the school in tuition should be thought of in the same light as the time and effort we contribute. The gift they represent is our participation in the quality of our children's (and our own) cultural experience—a gift that enhances the promise of their individual futures. The education each of our children receives at the VWS is comprised of experiences shared with every other child in the school. In this way, each parent's tuition contributes not only to their own child's education, but to that of all the other children as well.

Healthy economic policies must meet and balance our financial realities. These can only be found through the difficult and soul-searching struggles of people working together to build a sustainable community—one which is both socially as well as financially responsible.

#### **The TA Process**

The review process does not begin with new students until we have notice of acceptance from the class teacher. When an application is received, the information is reviewed and the family may be contacted by phone to gain further clarity. The application, which includes among other items, income and expense information, as well as the previous year's tax return assessment, is then reviewed.

In the majority of cases it is possible to make objective comparison to what other families with similar income levels and life situations are paying and then consider extenuating circumstances. Given such exceptions, most families that go through the process are asked to pay an adjusted tuition that represents a specific percentile *'window'* of their income. A family's history with the school and their commitment to Waldorf education is also considered in establishing a financial relationship that is healthy for both the family and the school.

By adjudicating all of the applications together, the entire TA budget can be worked with and kept in mind thereby achieving greater consistency in offering adjustments. Afterwards, there may be follow-up discussions or meetings with families.

Once an adjusted tuition has been assessed, the family is notified with a letter containing a Tuition Agreement, which when signed and returned to the school office, formally accepts the adjusted tuition level. If the assessed adjusted tuition is unworkable for the family, further conversation takes place to determine if there is new information about the family's situation that would warrant a further adjustment.

# FINANCIAL STATEMENT – RESIDENCE I

When legally responsible parents/guardians reside in separate households, each household is required to provide individual financial statement information.\* A separate Financial Statement Form is also available for any parent or guardian wishing to file a confidential Financial Statement separately from this application. This form is available from the admissions office or from our website.

\* If both responsible parents/guardians reside in one household, please obtain a Single Residence Tuition Adjustment Form from the admissions office or our website.

**Parent/Guardian I** \_\_\_\_\_ **f** \_\_\_\_\_  
Name Family Code

## ANNUAL INCOME – RESIDENCE I 2011 2012 Estimated

Gross Salary and Benefits	\$ _____	\$ _____
Commissions	\$ _____	\$ _____
Child Support and Alimony	\$ _____	\$ _____
Pension Income	\$ _____	\$ _____
Trust Funds, Gifts	\$ _____	\$ _____
Business or Partnership Income	\$ _____	\$ _____
Other Income <small>i.e. rental income, students, WCB, EI</small>	\$ _____	\$ _____
Dividends, Interest, Stocks, Bonds, Annuities, Term Deposits	\$ _____	\$ _____
Child Tax Benefit <small>monthly _____ x 12</small>	\$ _____	\$ _____
BC Child Subsidy	\$ _____	\$ _____
Social Assistance <small>monthly _____ x 12</small>	\$ _____	\$ _____
<b>Total Annual Income</b>	<b>\$ _____</b>	<b>\$ _____</b>

**Do you own a business?**  Yes  No

If Yes, what is its status?  Corporation  Partnership  Sole Proprietorship

If either a partnership or corporation, please submit most recent Profit/Loss Statement, Balance Sheet and Tax return.

### ASSETS – RESIDENCE I

Market Value of Real Estate	\$	_____
Present value of Vehicle(s)	\$	_____
Savings	\$	_____
RRSPs	\$	_____
Other	\$	_____
<b>Total Assets</b>	<b>\$</b>	<b>_____</b>

### LIABILITIES – RESIDENCE I

Mortgage(s)	\$	_____
Credit Cards	\$	_____
Student Loans	\$	_____
Other Loans	\$	_____
Other	\$	_____
<b>Total Liabilities</b>	<b>\$</b>	<b>_____</b>

**EXPENSES – RESIDENCE I**

**PLEASE DO NOT INCLUDE VWS TUITION or FEES**

	<b>WEEKLY</b>	<b>MONTHLY</b>	<b>ANNUALLY</b>
Mortgage Payments	\$ _____	\$ _____	\$ _____
Property Taxes	\$ _____	\$ _____	\$ _____
Property Insurance	\$ _____	\$ _____	\$ _____
Repairs and Maintenance	\$ _____	\$ _____	\$ _____
Rent	\$ _____	\$ _____	\$ _____
Gas	\$ _____	\$ _____	\$ _____
Hydro	\$ _____	\$ _____	\$ _____
Telephone	\$ _____	\$ _____	\$ _____
Internet	\$ _____	\$ _____	\$ _____
Cable	\$ _____	\$ _____	\$ _____
Loan Payments	\$ _____	\$ _____	\$ _____
Interest	\$ _____	\$ _____	\$ _____
Childcare	\$ _____	\$ _____	\$ _____
Groceries	\$ _____	\$ _____	\$ _____
Clothing	\$ _____	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____	\$ _____
Medical Insurance	\$ _____	\$ _____	\$ _____
Medical Expenses	\$ _____	\$ _____	\$ _____
Dental	\$ _____	\$ _____	\$ _____
Income Tax, CPP, EI	\$ _____	\$ _____	\$ _____
Pension Contributions	\$ _____	\$ _____	\$ _____
Professional Fees	\$ _____	\$ _____	\$ _____
Dues	\$ _____	\$ _____	\$ _____
Taxi and Public Transport	\$ _____	\$ _____	\$ _____
School Bus Fees	\$ _____	\$ _____	\$ _____
Vehicle Insurance	\$ _____	\$ _____	\$ _____
Vehicle Service	\$ _____	\$ _____	\$ _____
Gas and Oil	\$ _____	\$ _____	\$ _____
Parking	\$ _____	\$ _____	\$ _____
Children’s Extracurricular	\$ _____	\$ _____	\$ _____
Entertainment/Recreation	\$ _____	\$ _____	\$ _____
Vacation	\$ _____	\$ _____	\$ _____
Charitable Donations	\$ _____	\$ _____	\$ _____
Support of Others	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____
	x52 \$ _____	x12 \$ _____	x1 \$ _____

4 Total Annual Expenses \$ \_\_\_\_\_

# FINANCIAL STATEMENT – RESIDENCE 2

When legally responsible parents/guardians reside in separate households, each household is required to provide individual financial statement information.\* A separate Financial Statement Form is also available for any parent or guardian wishing to file a confidential Financial Statement separately from this application. This form is available from the admissions office or from our website.

\* If both responsible parents/guardians reside in one household, please obtain a Single Residence Tuition Adjustment Form from the admissions office or our website.

**Parent/Guardian 2** \_\_\_\_\_ **f** \_\_\_\_\_  
Name Family Code

<b>ANNUAL INCOME – RESIDENCE 2</b>	<b>2011</b>	<b>2012</b> <small>Estimated</small>
Gross Salary and Benefits	\$ _____	\$ _____
Commissions	\$ _____	\$ _____
Child Support and Alimony	\$ _____	\$ _____
Pension Income	\$ _____	\$ _____
Trust Funds, Gifts	\$ _____	\$ _____
Business or Partnership Income	\$ _____	\$ _____
Other Income <small>i.e. rental income, students, WCB, EI</small>	\$ _____	\$ _____
Dividends, Interest, Stocks, Bonds, Annuities, Term Deposits	\$ _____	\$ _____
Child Tax Benefit <small>monthly _____ x 12</small>	\$ _____	\$ _____
BC Child Subsidy	\$ _____	\$ _____
Social Assistance <small>monthly _____ x 12</small>	\$ _____	\$ _____
<b>Total Annual Income</b>	<b>\$ _____</b>	<b>\$ _____</b>

**Do you own a business?**  Yes  No

If Yes, what is its status?  Corporation  Partnership  Sole Proprietorship

If either a partnership or corporation, please submit most recent Profit/Loss Statement, Balance Sheet and Tax return.

## ASSETS – RESIDENCE 2

Market Value of Real Estate	\$ _____
Present value of Vehicle(s)	\$ _____
Savings	\$ _____
RRSPs	\$ _____
Other	\$ _____
<b>Total Assets</b>	<b>\$ _____</b>

## LIABILITIES – RESIDENCE 2

Mortgage(s)	\$ _____
Credit Cards	\$ _____
Student Loans	\$ _____
Other Loans	\$ _____
Other	\$ _____
<b>Total Liabilities</b>	<b>\$ _____</b>

**EXPENSES – RESIDENCE 2**

**PLEASE DO NOT INCLUDE VWS TUITION or FEES**

	<b>WEEKLY</b>	<b>MONTHLY</b>	<b>ANNUALLY</b>
Mortgage Payments	\$ _____	\$ _____	\$ _____
Property Taxes	\$ _____	\$ _____	\$ _____
Property Insurance	\$ _____	\$ _____	\$ _____
Repairs and Maintenance	\$ _____	\$ _____	\$ _____
Rent	\$ _____	\$ _____	\$ _____
Gas	\$ _____	\$ _____	\$ _____
Hydro	\$ _____	\$ _____	\$ _____
Telephone	\$ _____	\$ _____	\$ _____
Internet	\$ _____	\$ _____	\$ _____
Cable	\$ _____	\$ _____	\$ _____
Loan Payments	\$ _____	\$ _____	\$ _____
Interest	\$ _____	\$ _____	\$ _____
Childcare	\$ _____	\$ _____	\$ _____
Groceries	\$ _____	\$ _____	\$ _____
Clothing	\$ _____	\$ _____	\$ _____
Life Insurance	\$ _____	\$ _____	\$ _____
Medical Insurance	\$ _____	\$ _____	\$ _____
Medical Expenses	\$ _____	\$ _____	\$ _____
Dental	\$ _____	\$ _____	\$ _____
Income Tax, CPP, EI	\$ _____	\$ _____	\$ _____
Pension Contributions	\$ _____	\$ _____	\$ _____
Professional Fees	\$ _____	\$ _____	\$ _____
Dues	\$ _____	\$ _____	\$ _____
Taxi and Public Transport	\$ _____	\$ _____	\$ _____
School Bus Fees	\$ _____	\$ _____	\$ _____
Vehicle Insurance	\$ _____	\$ _____	\$ _____
Vehicle Service	\$ _____	\$ _____	\$ _____
Gas and Oil	\$ _____	\$ _____	\$ _____
Parking	\$ _____	\$ _____	\$ _____
Children’s Extracurricular	\$ _____	\$ _____	\$ _____
Entertainment/Recreation	\$ _____	\$ _____	\$ _____
Vacation	\$ _____	\$ _____	\$ _____
Charitable Donations	\$ _____	\$ _____	\$ _____
Support of Others	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
	\$ _____	\$ _____	\$ _____
<b>Subtotal</b>	\$ _____	\$ _____	\$ _____
	x52 \$ _____	x12 \$ _____	x1 \$ _____

6 Total Annual Expenses \$ \_\_\_\_\_

## OTHER INFORMATION

Why is it important to you that your children attend the Vancouver Waldorf School?

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Please list your current or planned volunteer contributions to the school?

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Please provide any other information that you feel would help the Tuition Adjustment Committee in assessing this application:

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Have there been any significant financial changes in your situation in the past year or do you anticipate major changes in your financial situation during the coming year?  Yes  No If no, please explain:

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Have you requested tuition assistance from relatives and friends?  Yes  No If yes, amount \$ \_\_\_\_\_

Should your economic situation in the future permit you to offer a financial donation to the school, would you consider at least 25% of your adjusted tuition?  Yes  No

## APPLICATION ESSENTIALS

PLEASE READ: For application consideration, ALL the following items must be complete. Applications that do not make a tuition offer or include required Financial Statement information and 2010 Notice(s) of Assessment **will be returned**.

## TUITION OFFER

What are you collectively able to pay **MONTHLY**? Please give **due consideration** to this item.

Total Tuition amount that your family can afford to pay **monthly** to VWS in 2012–2013 \$ \_\_\_\_\_

## EARLY CHILDHOOD SUBSIDY

If any of your children are in an Early Childhood Program have you applied for government subsidy?  Yes  No

## PARENT/GUARDIAN 1 Financial Statement Information & 2010 Notice of Assessment

- I have enclosed with this form, all required Financial Statement information. (Please keep copies for your records.)  
 I have enclosed a copy of my CRA 2010 Notice of Assessment  I was not employed in 2010

I declare that the information on my forms is true, correct and complete to the best of my knowledge.

Signature of Parent/Guardian 1 \_\_\_\_\_ Date \_\_\_\_\_  
yyyy mm dd

## PARENT/GUARDIAN 2 Financial Statement Information & 2010 Notice of Assessment

- I have enclosed with this form, all required Financial Statement information. (Please keep copies for your records.)  
 I have enclosed a copy of my CRA 2010 Notice of Assessment  I was not employed in 2010

I declare that the information on my forms is true, correct and complete to the best of my knowledge.

Signature of Parent/Guardian 2 \_\_\_\_\_ Date \_\_\_\_\_  
yyyy mm dd

## ADDRESS and CONTACT INFORMATION

2725 St Christophers Road  
North Vancouver BC V7K 2B6  
Canada

Telephone | 604 985 7435 x200  
Facsimile | 604 985 4948  
Email | admissions@vws.ca

### For office use only:

Received by: \_\_\_\_\_ Date: \_\_\_\_\_ Time: \_\_\_\_\_  
yyyy mm dd hh mm

- Tuition contract signed  2008–2012 account paid in full  
 Application completed  2008–2012 Balance \$\_\_\_\_\_ . \_\_\_\_  DR  CR  
 2010 Notice(s) of Assessment  \$100 Late Application Fee paid