

Financial Aid Application for the 2012-2013 School Year

WITH A COPY OF YOUR SIGNED 2011 IRS TAX RETURN & ALL W-2s & OTHER FORMS, return this form with payment (\$40 payable to The Circle School) to the following address: Flowers & Flowers CPAs, 5775 Allentown Blvd, Suite 102, Harrisburg PA 17112. This form and all documentation submitted will be disclosed to the school as necessary for processing.

Complete this form only once per school year, even if you are enrolling (or considering enrolling) more than one child.

Based on your application, the processing agency and school will determine the amount of financial aid to be granted. The school will notify you of the amount of financial aid to be awarded, and the amount the student's family will be expected to pay.

Answer the questions for the student's "Parent", as determined by the following statements as they applied on **December 31, 2011**:

<i>If this statement applies...</i>	<i>Then complete this form for...</i>	<i>Filing status</i>
The student's parents are both living, married or partnered to each other, and not separated.	Both parents.	MARRIED
The student's parents are divorced or separated on December 31, 2011.	The parent with whom the student lives <i>and</i> the person whom the parent remarried or repartnered.	REMARRIED
	The parent with whom the student lives, if that parent is not remarried or repartnered.	DIVORCED
The student's parent is single or widowed.	The parent.	SINGLE

Part I. Household information

1. Student's full name(s)	
2. Parent Filing Status (from table above)...	Circle One: MARRIED ● DIVORCED ● REMARRIED ● SINGLE
3. Full name of Parent #1	
4. Full name of Parent #2	
5. Parent's mailing address.....	
6. Name of person preparing this form, email address, and daytime phone number.....	NAME: EMAIL: PHONE:
7. If the student is new to the school, indicate the expected or desired starting attendance date. <i>For returning students, write "n/a".</i>	
8. How many people are in the Parent's household? <i>Include the student and both parents. Also include other persons who are primarily supported (more than half) by the Parent, and who will continue to be supported by the Parent during the period July 1, 2012 through June 30, 2013.</i>	
9. How many of the people in the Parent's household will be in college during the period July 1, 2012 through June 30, 2013? <i>Do NOT include the parents. Include only students who will be enrolled at least half time in a program that leads to an undergraduate college degree or certificate.</i>	

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Part II. Parent financial data, from tax forms for the year 2011

10. Adjusted gross income for 2011. <i>Adjusted Gross Income is on IRS Form 1040–line 37; 1040A–line 21; 1040EZ–line 4.</i>	\$
11. Enter the total amount of the Parent's income tax for 2011. <i>Income tax amount is on IRS Form 1040 – line 55; 1040A – line 35; 1040EZ – line 10.</i>	\$
12. Enter the Parent's exemptions for 2011. <i>Exemptions are on IRS Form 1040–line 6d; 1040A–line 6d. For 1040EZ use worksheet line F.</i>	
13. How much did Parent #1 earn from working (wages, salaries, tips, etc.) in 2011? <i>This information may be included on W-2 forms, or on IRS 1040–lines 7 + 12 + 18 + Box 14 of Schedule K-1 (Form 1065); 1040A–line 7; or 1040EZ–line 1. Answer this question even if you did not file a tax return.</i>	\$
14. How much did Parent #2 earn from working (wages, salaries, tips, etc.) in 2011? <i>This information may be included on W-2 forms, or on IRS 1040–lines 7 + 12 + 18 + Box 14 of Schedule K-1 (Form 1065); 1040A–line 7; or 1040EZ–line 1. Answer this question even if you did not file a tax return.</i>	\$
<p>15. Adjustments – Category “B”. (There is no Category “A”).</p> <p>a. Payments to tax-deferred pensions and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S</p> <p>b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans. <i>From IRS Form 1040 – total of lines 28+32 or 1040A–line 17.</i></p> <p>c. Child support received for all children in the household. (Do NOT include foster care or adoption payments.)</p> <p>d. Tax exempt interest income. <i>From IRS Form 1040–line 8b or 1040A–line 8b.</i></p> <p>e. Untaxed portions of IRA distributions. <i>From IRS Form 1040–lines (15a minus 15b) or 1040A–lines (11a minus 11b). Exclude rollovers. If negative, enter zero here.</i></p> <p>f. Untaxed portions of pensions. <i>From IRS Form 1040–lines (16a minus 16b) or 1040A–lines (12a minus 12b). Exclude rollovers. If negative, enter zero here.</i></p> <p>g. Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits).</p> <p>h. Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. ...</p> <p>i. Any other untaxed income or benefits (for any household member) not reported elsewhere, such as Social Security benefits, disability, unemployment, worker's compensation, railroad retirement benefits, etc. Do NOT include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements (such as cafeteria plans).</p> <p>j. Money and other support received by you or paid on your behalf during 2011 that is not reported elsewhere on this form. For example, if some or all of the costs of housing or other living expenses were paid by someone else in your household whose income is not included on this form, then report here the value of such support. If the value is not known, use your best estimate. Also include cash and the value of other support received from or paid by the student's grandparents, relatives, and others. Also include scholarships and awards</p>	<p>\$</p>
TOTAL Adjustments. <i>Sum of lines a through j above.</i>	\$

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<p>16. Adjustments – Category “C”</p> <p>a. Education credits (American Opportunity, Hope and Lifetime Learning tax credits). From IRS Form 1040–line 49 or 1040A–line 31.</p> <p>b. Child support paid by Parent in 2011 because of divorce or separation. <i>Do NOT include support for children in Parent’s household (Question 8 above)</i>.....</p> <p>TOTAL Adjustments. <i>Sum of lines a and b</i>.....</p>	<p>\$</p> <p>\$</p> <p>\$</p>	<p></p> <p></p> <p>\$</p>
<p>17. How much did the student(s) earn from working (wages, salaries, tips, etc.) in 2011? This information may be included on W-2 forms, or on IRS 1040–lines 7 + 12 + 18 + Box 14 of Schedule K-1 (Form 1065); 1040A–line 7; or 1040EZ–line 1. Answer this question even if student did not file a tax return.</p>	<p>\$</p>	
<p>18. How much did the student(s) receive in monetary gifts, Social Security benefits, distributions from trust funds, and all other sources not included in Line 17 or elsewhere on this form?.....</p>	<p>\$</p>	
<p>19. Amount (or percent) of student’s 2012-13 tuition to be paid by any other party (such as another parent, step-parent, grandparent, trust fund, agency, student, etc).....</p>	<p>\$</p>	
<p>20. Special consideration. If your household income fell substantially during or after 2011 you may be eligible for additional financial aid. If you think you qualify, write “YES” in the box at right and include brief details on a separate sheet. State the date and cause of the income reduction, <u>and monthly income before and after the reduction</u>. You may later be asked to provide additional information.</p>	<p></p>	
<p>21. Other special circumstances. If you incurred certain non-discretionary expenses that are not included in the federally established allowance for standard living expenses, then you may be eligible for a special adjustment. Circumstances that may qualify include unusual medical expenses in excess of 7.5% of AGI, temporary double housing payments because of relocation at least 50 miles closer to the school. Circumstances that do <u>not</u> qualify include anticipated <i>future</i> income reduction (which may qualify for a mid-year payment adjustment <i>when the reduction occurs</i>); children’s college expenses (already included based on your response on line 9); local moves; addition of family dependents (which may qualify for a mid-year payment adjustment if the addition occurred after the end of the tax year); car payments and other consumer debt; discretionary expenses. To apply for special adjustments, submit a brief statement <u>to the school’s financial officer</u>. (Email financial@CircleSchool.org or submit in writing.) If you qualify, you will be asked to submit verifying documents and a Supplemental Aid Application.</p>		

Part III. Parent declaration, release of information, and signatures

I declare that the information provided on this form and all attachments is correct and complete to the best of my knowledge and belief. I agree, if asked, to provide information that will verify the accuracy of the information provided on this form. I hereby authorize the school to release any or all of this application and supporting documents to EITC and PKTC Scholarship Organizations, and other third parties, to support scholarship/grant applications to benefit the student or the school.

Signature of Parent #1

Date

Signature of Parent #2

Date

DO NOT SUBMIT THIS FORM TO SCHOOL. Instructions for returning the completed form:

- Mail the completed form to the processing agency:
Flowers & Flowers CPAs, 5775 Allentown Blvd, Suite 102, Harrisburg PA 17112.
- Include your check for \$40, payable to *The Circle School*, to cover processing costs.
- Include a **signed** copy of the Parent’s IRS income tax returns, including *all* forms, schedules, and attachments, for the **2011** tax year. **Include all W-2 forms.**

Questions? Call the school’s financial officer (717-564-6700 or email financial@CircleSchool.org).