



The Carver Academy

Financial Information Form

FAMILY INFORMATION

Children for whom aid is being requested:

Name _____ Grade Desired _____ Date of Birth _____

Father (Guardian)

Name _____

Home Address _____

Number and Street

City, State, Zip

Telephone _____

Occupation _____

Employer _____

Work Phone _____

Cell Phone _____

Mother

Name _____

Home Address _____

Number and Street

City, State, Zip

Telephone _____

Occupation _____

Employer _____

Work Phone _____

Cell Phone _____

Marital Status: () Married () Divorced
() Separated () Widowed () Single

Marital Status: () Married () Divorced
() Separated () Widowed () Single

If separated or divorced, who has legal custody? _____

State financial obligation of the non-custodial parent. _____

If the non-custodial parent claims no financial responsibility, or limited financial responsibility, for education expenses, submit appropriate documentation, such as court decree.

FAMILY INFORMATION

Please list all children under the age of 18, from oldest to youngest, including the child/ children for whom you are requesting tuition aid. Also include children who do not live at home with you.

1. Name _____ Age _____ Present Grade _____

Present School _____

Lives at Home?

Yes No

2. Name _____ Age _____ Present Grade _____

Present School _____

Lives at Home?

Yes No

3. Name _____ Age _____ Present Grade _____

Present School _____

Lives at Home?

Yes No

FAMILY INFORMATION

Other dependents whom you support:

Name _____ Relationship _____ Lives at Home? Yes No

Name _____ Relationship _____ Lives at Home? Yes No

FINANCIAL INFORMATION

The following information will enable the Tuition Aid Committee to determine your eligibility. All questions must be answered in full. Where the answer to a questions is none, please so state. **All information here is for the purpose of determining your tuition aid amount and will be kept confidential.**

ASSETS

Amount of cash or investments

Savings	\$ _____
Checking	\$ _____
Certificates of deposit	\$ _____
Other	\$ _____
Current value of stocks, bonds, and all other securities	\$ _____

Home: own rent If home is owned, year purchased _____ Purchase price \$ _____

Present market value of home? \$ _____

Other real estate:

Description: _____ Year purchased? _____ Purchase price? \$ _____

Description: _____ Year purchased? _____ Purchase price? \$ _____

Description: _____ Year purchased? _____ Purchase price? \$ _____

Present market value of other real estate? \$ _____

Other business assets:

(sole proprietorship, partnership interests, closely held corporate stock, etc.)

Market value of other business assets? \$ _____

Other Assets:

Value of trust assets of which you or your children are the beneficiaries? \$ _____

Automobiles:

Make _____ Year _____ Estimated market value? \$ _____

Make _____ Year _____ Estimated market value? \$ _____

Make _____ Year _____ Estimated market value? \$ _____

Value of other assets. Please list. Explain on separate sheet if necessary. \$ _____

TOTAL VALUE OF ALL ASSETS _____ \$ _____

CURRENT LIABILITIES

Has home been refinanced since purchased? _____ Yes _____ No If yes, Year? _____ Amount? \$ _____

Principal remaining on home mortgage? \$ _____

Principal remaining on other real estate mortgages? \$ _____

Automobile debt outstanding? \$ _____

Other Debt:

Personal loans \$ _____

Credit cards \$ _____

Equity loans \$ _____

Other: _____ \$ _____

TOTAL LIABILITIES _____ → \$ _____

TOTAL NET WORTH (Total assets minus total liabilities) _____ → \$ _____

This reported income is actual estimated for

2009 calendar year

2010 calendar year

(Most families with children already enrolled in school and submitting an application for the Fall 2010 deadline would provide actual income for 2009, which would then be confirmed by copies of actual tax returns and/or other documentation).

	Father	Mother
Salaries, Wages, and Bonuses	\$ _____	\$ _____
Business income	\$ _____	\$ _____
Dividends and interest income	\$ _____	\$ _____
Capital gains income	\$ _____	\$ _____
Income trusts, inheritances, etc.	\$ _____	\$ _____
Income from alimony	\$ _____	\$ _____
Income from child support	\$ _____	\$ _____
Income from other sources not included above	\$ _____	\$ _____

TOTAL INCOME OF EACH PARENT _____ → \$ _____

TOTAL COMBINED INCOME OF BOTH PARENTS

HOUSEHOLD EXPENSES

Check if reported as: monthly or yearly

Rent payments

\$ _____

Mortgage payments

\$ _____

Insurance (Please detail. Ex. Auto, Home)

\$ _____

Utility Expense

\$ _____

All other utilities, including telephone

\$ _____

Income tax paid

\$ _____

Automobile payments

\$ _____

Medical expenses (List and explain)

\$ _____

Other loan expenses (List and explain)

\$ _____

Support of parents or other dependents.
Please detail.

\$ _____

TOTAL HOUSEHOLD EXPENSES →

\$ _____

We declare that the information provided on this form is, to the best of our knowledge, true, complete, and accurate.

By submitting this signed application we agree to notify the Tuition Aid Committee promptly of any substantial change in our family's financial situation, for example, if a parent is not employed at the time the application was submitted, but becomes employed after the application is submitted. I/we understand that failure to notify the Tuition Aid Committee promptly of any such substantial change in our family's financial situation may jeopardize continued financial assistance. **I/we also understand that if the student receives a failing grade on his/her report card, the scholarship awarded by The Carver Academy may be revoked.**

Signature of Father

Date

Signature of Mother

Date

Please provide the following:

- Current IRS Tax Return
- Current W-2, 1090 or other IRS wage or compensation document