

# 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.

### **By March 22, 2019:**

Financial aid application and all supporting documents due for current and new applicants. Applicants with scanned copies of documentation may be emailed to: [FA@lilgoldman.org](mailto:FA@lilgoldman.org). Sealed packets may also be returned to Esther Wolf or Kayla Morris at Lil Goldman.

- **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.**

### **Camp: April 18, 2019**

Families will be notified of Financial Aid decisions on or before April 18, 2019.

### **Academic: May 3, 2019**

Families will be notified of Financial Aid decisions on or before May 3, 2019.

**Need more information? Contact [FA@lilgoldman.org](mailto:FA@lilgoldman.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)

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)

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 \_\_\_\_\_

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 \_\_\_\_\_

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 \_\_\_\_\_

**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>
<b>Total Assets</b>	<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>
<b>Total Liabilities</b>	<u>-</u>
<b>Net Worth</b>	<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: \_\_\_\_\_