



School Year 2018/2019
Kindly Return to Kayla Green in the TBS/S Office

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APPLICATION FOR TUITION ASSISTANCE

Child's Name _____

Date of Birth _____

Home Address _____

City, State, Zip _____

How much tuition assistance are you seeking? _____

This application WILL NOT BE CONSIDERED without an amount listed above.

APPLICATION CHECK LIST
<input type="checkbox"/> Complete all parts of application form
<input type="checkbox"/> Include most recent completed Federal Income Tax Return 1040 Form and Schedules
<input type="checkbox"/> Include a letter summarizing your reasons for applying for a scholarship

Personal Information (If Parent/Legal Guardians are separated, please submit separate form)

Parent/Legal Guardian (1) _____

Address (if different from above) _____

Home phone _____ Cell phone _____ Email _____

Social Security Number _____ Date of Birth _____

Occupation _____ Name of Business _____

Position or Title _____ Work phone _____

Please list dependent(s) Name(s) _____

Age(s) _____

Annual School/Daycare expenses _____

Parent/Legal Guardian (2) _____

Address (if different from above) _____

Home phone _____ Cell phone _____ Email _____

Social Security Number _____ Date of Birth _____

Occupation _____ Name of Business _____

Position or Title _____ Work phone _____

Please list dependent(s) Name(s) _____

Age(s) _____

Annual School/Daycare expenses _____

CERTIFICATION AND AUTHORIZATION FOR FINANCIAL DISCLOSURE

Be sure to include a complete and signed copy of the parent or legal guardian's most recently filed Federal Income Tax Return 1040 Form including W-2s and all schedules. Financial need within the family is considered in awarding Temple Beth Sholom Innovative School scholarships. Please explain in detail any special financial conditions/factors that you feel should be brought to the attention of the Scholarship Committee to help determine the need (attach additional sheets if necessary). All information is kept in complete confidence.

On behalf of my child, I apply for a scholarship to the Temple Beth Sholom Innovative School. To the best of my knowledge, all information stated in this application is accurate and complete. I understand that the decision of the Scholarship Committee is final.

Parent/Legal Guardian (please print full name) _____

Signature _____ Date _____

Section 1

PERSONAL FINANCIAL STATEMENT

Statement date _____

ASSETS		LIABILITIES	
1. Cash on hand & in banks		21. Notes due to banks	
2. Cash value of life insurance		22. Notes due to relatives & friends	
3. U.S. Gov. Securities		23. Notes due to others	
4. Other marketable securities		24. Accounts & bills payable	
5. Notes & Accounts Receivable - Good		25. Unpaid income, taxes due - Federal/State	
6. Other assets readily convertible to cash -- Itemize		26. Other unpaid taxes and interest	
7.		27. Loans on life insurance policies	
8.		28. Contract accounts payable	
9.		29. Cash rent owed	
10. Total Current Assets		30. Other liabilities due within 1 year – Itemize	
11. Real Estate owned		31.	
12. Mortgages & contracts owned		32.	
13. Notes & accounts receivable - Doubtful		33. Total Current Liabilities	
14. Notes due from relatives and friends		34. Real Estate mortgage payable	
15. Other securities – Not readily marketable		35. Liens & assessments payable	
16. Personal property		36. Other debts – Itemize	
17. Other assets - Itemize		37.	
18.		38. Total liabilities	
19.		39. Net worth (total assets – totals liabilities)	
20. Total Assets		40. Total liabilities & Net worth	

ANNUAL INCOME		ESTMATE OF ANNUAL EXPENSES	
Salary, bonuses & commissions		Income taxes	
Dividends & interests		Other taxes	
Rental and lease income (net)		Insurance premiums	
Other income – itemize		Mortgage payments	
Other persons salary, bonuses and commissions		Rent payable	
Other income of other persons - itemize		Other expenses	
Total		Total	

GENERAL INFORMATION		CONTINGENT LIABILITIES	
Are any assets pledged?	<input type="checkbox"/> No <input type="checkbox"/> Yes	As endorser, co-maker or guarantor - Yes	
Are you s defendant in any legal suits or legal actions? (explain)	<input type="checkbox"/> No <input type="checkbox"/> Yes	On leases or contracts	
Have you been declared bankrupt in the last 10 years (explain)	<input type="checkbox"/> No <input type="checkbox"/> Yes	Legal claims	
		Federal /State income taxes	
		Other -	

Section 2

PERSONAL FINANCIAL STATEMENT

A. Cash in Banks and Noted Due to Banks

Name of bank	Type of account	Type of ownership	On deposit	Notes due banks	COLLATERAL (If any) & type of ownership
Cash on Hand					
Totals					

B. Life Insurance (List only the policies that you own)

Company	Face of policy	Cash surrender value	Policy loan from insurance co.	Other loans policy as collateral	Beneficiary
Totals					

C. Securities Owned

Face value bonds No. of shares stock	Indicate those net registered in year	Type of ownership	Cost	Market values U.S. Gov. Sec.	Market values marketable Sec.	Market value not readily marketable securities	Amount pledged to secured loans
Totals							

D. Notes and Accounts Receivable (Money payable or owed to you individually – Indicate by a “x” if others have an ownership interest)

Maker/Debtor	x	When due	Original amount	Balance due, good accounts	Balance due, doubtful accounts	Balance due notes to relatives and friends	Security (if any)
Totals							

E. Real Estate Owned (Indicate by a “X” if others have an ownership interest)

MORTGAGE CONTRACT PAYABLE

Title in name of	Descriptions & locations	x	Date acquired	Original cost	Present value of real estate	Amount of insurance carried	Balance due	Payment	Maturity	To whom payable
Total						Total				

Section 2 (continued)

PERSONAL FINANCIAL STATEMENT

F. Mortgages and Contracts Owned (Indicate by a "X" if others have an ownership interest)

Contract	Mortgage	x	Maker name	Maker address	Property covered	Start date	Payment	Maturity	Balance due
								Totals	

G. Personal Property (Indicate by a "X" if others have ownership interest)

Description	x	Date when new	Cost when new	Value today	Balance due	To whom payable
				Total		

H. Notes (Other bank, mortgages and insurance company loans)

Payable to	Other obligors (if any)	When due	Notes due to relatives and friends	Notes due to "others" (not banks)	Accounts and bills payable	Contracts payable	Collateral (if any)
			Totals				

For the purpose of procuring credit from time to time, I/We furnish the foregoing as a true and accurate statement of my/our financial condition. Authorization is hereby given to the Lender to verify in any manner it deems appropriate any and all items indicated on this statement. The undersigned also agrees to notify the Temple Beth Sholom Innovative School registrar immediately in writing of any significant adverse change in such financial condition.

Signature _____

Signature _____

Date _____