



## SCHOLARSHIP APPLICATION

### Families Applying for School Year 2024 - 2025

NEW APPLICATION: \_\_\_\_\_ RENEWAL: \_\_\_\_\_ DATE: \_\_\_\_\_

STUDENT'S NAME: \_\_\_\_\_

HOME ADDRESS: \_\_\_\_\_

TELEPHONE #: \_\_\_\_\_ (HOME) \_\_\_\_\_ (CELL)

PRIMARY EMAIL ADDRESS: \_\_\_\_\_

#### FAMILY INFORMATION:

Student lives with:

\_\_\_\_\_ Both Parents

\_\_\_\_\_ Other (explain)

\_\_\_\_\_  
\_\_\_\_\_

Check, if any apply:

\_\_\_\_\_ Parents separated (month / yr. \_\_\_\_\_)

\_\_\_\_\_ Parents divorced (month / yr. \_\_\_\_\_)

\_\_\_\_\_ Student has legal guardian

\_\_\_\_\_ Parent unable to work

\_\_\_\_\_ Parent deceased

#### PARENT / GUARDIAN 1

Name:

Age:

Home Address:

Home Phone:

Occupation:

Title:

#### PARENT / GUARDIAN 2

Name:

Age:

Home Address:

Home Phone:

Occupation:

Title:

Employed by:

Employed by:

Years in current job:

Years in current job:

Full or part-time?

Full or part-time?

Work phone:

Work phone:

Other jobs?

Other jobs?

IF CHILD DOES NOT LIVE WITH BOTH PARENTS, PLEASE FILL IN BELOW:

Name of parent claiming student as a tax dependent in 2023: \_\_\_\_\_

PARENTS' ANNUAL INCOME AND EXPENSES

(Please give these amounts before deductions for taxes, social security, etc.)

1) <u>Taxable Income:</u>	2023	Estimated 2024
A. Salaries / Wages Parent / Guardian 1:	_____	_____
B. Salaries / Wages Parent / Guardian 2:	_____	_____
C. Income from tenants/borders:	_____	_____
D. Dividend and/or interest income:	_____	_____
E. Alimony received:	_____	_____
F. Net profit (loss) from business:	_____	_____
G. Other taxable income (give sources):	_____	_____

2) <u>Non -Taxable Income:</u>	2023	Estimated 2024
A. Child support received:	_____	_____
B. Social Security benefits:	_____	_____
C. Payments to IRA, 401-Ks, and/or other retirement plans:	_____	_____
D. Other non-taxable income: (please give sources)	_____	_____
E. Gift income from relatives/friends:	_____	_____

3) <u>Expenses:</u>	2023	Estimated 2024
A. Total federal income tax paid (Use total tax, not amount withheld)	_____	_____
B. Total Social Security (FICA) paid	_____	_____
C. Massachusetts State Tax paid (amount owed)	_____	_____
D. If you own your house and other properties how much in real estate taxes do you pay?	_____	_____
E. Total medical/dental expenses, not covered by insurance, plus medical insurance premiums paid.	_____	_____
F. If you had any emergency or unusual expenses, give amounts and <u>explain</u> . Do not include replacement or repair costs for car or home.	_____	_____
G. Do you pay any child support / alimony?	_____	_____

4) **PLEASE LIST ALL DEPENDENT CHILDREN** living in your household, including applicant.  
(List applicant first). List all school fees. Do not list day care (See # 9C)

	Child 1	Child 2	Child 3
Name and age of child:	_____	_____	_____
Name of school:	_____	_____	_____
Public / private / college:	_____	_____	_____
Grade / Year in school:	_____	_____	_____
Total cost per year:	_____	_____	_____
Amount paid by Parent / Guardian:	_____	_____	_____

Amount tuition aid: \_\_\_\_\_

Amount from loans: \_\_\_\_\_

5) PARENT/GUARDIAN EDUCATION

Parent / Guardian 1

Parent / Guardian 2

Name and age of parent/guardian: \_\_\_\_\_

Enrolled Full or part-time: \_\_\_\_\_

Name of school: \_\_\_\_\_

Total cost per year: \_\_\_\_\_

Amount paid: \_\_\_\_\_

Amount of tuition aid: \_\_\_\_\_

Amount from loans: \_\_\_\_\_

Total cost: \_\_\_\_\_

6) OTHER DEPENDENTS: (adult or child)

Please list the names of any other dependents and indicate where they live. Also, include the amount of dollar support you provided to them in 2023 and amount expected to be given in 2024:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

7) HOUSING:

A. If you rent your home, list monthly rent excluding utilities: \$ \_\_\_\_\_

If you:

B. Own your own home

C. Own other real estate

Year purchased \_\_\_\_\_

Purchase price \_\_\_\_\_

Total value-fire insurance \_\_\_\_\_

Present market value \_\_\_\_\_

Monthly mortgage payments \_\_\_\_\_

(exclude tax escrow)

Mortgage held by	_____	_____
Unpaid mortgage balance	_____	_____
One / two family house	_____	_____
Rent received in 2023	_____	_____
Rent expected in 2024	_____	_____

D. If you do not have rent/mortgage payments on family residence, please explain:

\_\_\_\_\_

\_\_\_\_\_

8) OTHER ASSETS:

A. Other investments? Specify and give value.

\$ \_\_\_\_\_

\$ \_\_\_\_\_

B. Life insurance policies? Total face value.

\$ \_\_\_\_\_

\$ \_\_\_\_\_

C. Assets held by children. Specify and give value.

\$ \_\_\_\_\_

\$ \_\_\_\_\_

D. Trust Funds established for students (now or future). Provide details.

\$ \_\_\_\_\_

\$ \_\_\_\_\_

E. Savings account(s):

\$ _____	amount	_____	bank
\$ _____	amount	_____	bank
\$ _____	amount	_____	bank

F. Money market accounts:

\$ _____	amount	_____	name
\$ _____	amount	_____	name
\$ _____	amount	_____	name

G. Checking accounts:

\$ _____	amount	_____	bank
\$ _____	amount	_____	bank
\$ _____	amount	_____	bank

H. Complete the following only if you **own a business**: Percentage of ownership? \_\_\_\_\_%  
 Assets \_\_\_\_\_  
 Liabilities \_\_\_\_\_

I. Car(s) / recreational vehicles / boats, owned or leased:

	#1	#2	#3
Make	_____	_____	_____
Model	_____	_____	_____
Year	_____	_____	_____
Own Outright	_____	_____	_____
Part Owner	_____	_____	_____
Monthly Payments	_____	_____	_____
Payment Termination Date	_____	_____	_____

9) OBLIGATIONS / INDEBTEDNESS:

A. Indebted to:                      For:                      Total Owed:                      Total Amount to be Paid:

B. List names and amounts of yearly dues / fees for clubs and memberships:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

C. Total employment-related day care expenses (2023)  
 Important - Do not include school tuition here. School tuition was itemized previously.

Total daycare expenses in 2023                      \$ \_\_\_\_\_

D. Costs of summer camps in 2023                      \$ \_\_\_\_\_

E. Costs of family vacations in 2023                      \$ \_\_\_\_\_

F. Costs of lessons / activities in 2023 for family members (music, sports, dance, etc.)                      \$ \_\_\_\_\_

10) FAMILY ASSISTANCE:

A. Occasionally, grandparents or other family members are able to help families with tuition expenses. Is this possible in your case? \_\_\_\_\_

Please Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11) In reviewing your family's financial situation, please indicate the amount you think you can pay in school year 2024 - 2025 as part of the total tuition/fees:

	Child # 1	Child # 2	Child # 3
From parents' income & assets:	_____	_____	_____
From student earnings & assets:	_____	_____	_____
From friends, relatives, & trusts:	_____	_____	_____
From Social Security benefits:	_____	_____	_____
From loans:	_____	_____	_____
From other sources:	_____	_____	_____

12. Have you applied for tuition aid at other schools?      \_\_\_\_\_ YES      \_\_\_\_\_ NO

If yes, please list schools: \_\_\_\_\_  
\_\_\_\_\_

**STATEMENT FROM PARENTS:** Families are encouraged to include a personal statement or additional information, which may assist the Scholarship Committee in understanding your family's financial situation. (Attach separate pages as needed)

**PLEASE ENCLOSE ALL REQUIRED DOCUMENTS AND SIGN / DATE THE APPLICATION.**

\_\_\_\_\_ Signed and dated (2022) tax returns and all schedules are enclosed

\_\_\_\_\_ Copies of our (2022) W2 forms are enclosed.

I understand that my application will not be considered without a completed signed Scholarship Application and all required information and tax returns.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Parent / Guardian 1

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Parent / Guardian 2

**REMINDER: 2023 TAX FORMS must be submitted once filed.**  
**Personal letters explaining circumstances are always welcomed.**