



Wilmington Montessori
School

2012-2013 Financial Aid Application

**This form must be submitted by hand and a receipt obtained
by 1/11/12**

Please complete and submit:

- (1) this form,
- (2) **copy of last paystub of 2011 for *all* wage earners,**
- (3) our processing fee of \$25 to:

Carolyn Fuhrman

Please make sure you receive a receipt for the packet
Stating the date submitted

Please make checks payable to Wilmington Montessori School

Questions? Call Carolyn at 302-475-0555

E-Mail: carolyn_fuhrman@wmsde.org

SECTION A – PARENT OR GUARDIAN INFORMATION

Include all parents or guardians who reside in the family home. PLEASE PRINT CLEARLY

Parent 1

Please check one: Parent Stepparent Guardian

Last Name First Name M.I.

Social Security Number Age Work Telephone Number

Email address _____

Occupation

Employer (Please note if self-employed) # Years

Marital Status (please check one): Single Married
 Separated Divorced Widowed

If any student's parents are divorced or separated, is there an agreement which requires the non-custodial parent (not listed here) to make contributions specifically earmarked for education? YES___ NO___. If so, what is the annual contribution? \$ _____

Parent 2

Please check one Parent Stepparent Guardian

Last Name First Name M.I.

Social Security Number Age Work Telephone Number

Email address _____

Occupation

Employer (Please note if self-employed) # Years

Marital Status (please check one): Single Married
 Separated Divorced Widowed

SECTION B – HOUSEHOLD INFORMATION

PLEASE PRINT CLEARLY

Street Address: _____ City: _____

State: _____ Zip Code: _____ Home Telephone Number: _____

How many people will reside at this address during the 2012-13 school year? No. of Parents: _____ No. of Children: _____

SECTION C – INFORMATION ABOUT DEPENDENTS

Include all dependents who reside in the family home and rely on the adults in Section A for their primary support.

Please print the full name and age of each child below. If the child will attend a tuition-charging school, college, preschool or day care facility during the 2012-13 school year, provide the information requested. **Please indicate amount of aid requested in the last column.**

Last Name	First Name	Age	School, Preschool, College or Daycare Provider* Name	Program/Grade* 2012-2013	Aid Requested - \$ or %

*Enter Under Program/Grade: "D" for Daycare, "C" for College, "P" for Preschool
For WMS (prospective) students, please indicate the program for which you are asking aid, e.g. P3H (three half day preschool)

SECTION D - INCOME AND EXPENSES

Please provide the following information for **2011**. Enter zero if applicable. Omit cents.

Parent or Guardian Information

Gross Wages, Salaries and Tips	_____	.00	From W-2 (or last paystub of 2011)
Deferred Income	_____	.00	From W-2 (or last paystub of 2011)
Pre-tax Deductions.....	_____	.00	From W-2 (or last paystub of 2011)
Taxable Interest Income	_____	.00	
Tax-Exempt Interest Income	_____	.00	
Dividend Income.....	_____	.00	
Alimony Received.....	_____	.00	
Business Income or (Loss).....	_____	.00	
Realized Capital Gains or (Losses)	_____	.00	
Taxable Retirement Annuity	_____	.00	
Rental Properties, Royalties, Partnerships,	_____	.00	
S. Corporations, Trusts, Etc			
Farm Income or (Loss)	_____	.00	
Unemployment Compensation	_____	.00	
Taxable Social Security Benefits	_____	.00	
Non-taxable Social Security Benefits.....	_____	.00	
Other Taxable Income	_____	.00	
Worker's Compensation Received	_____	.00	Include any compensation received during 2011
Welfare Received	_____	.00	Include AFDC, ADC received during 2011.
Food Stamps Received	_____	.00	Include the total received during 2011.
Child Support Received.....	_____	.00	Do not include amounts reported in Section A Specifically earmarked for educational purposes.
Other Non-Taxable Income	_____	.00	Include any income not listed above, i.e. Veterans Benefits, housing, insurance, etc.
Federal Income Taxes Paid.....	_____	.00	As noted on your 2011 tax return
Child Support Paid	_____	.00	Include the total paid during 2011.
Alimony Paid	_____	.00	Include the total paid during 2011.
Medical and Dental Expenses not paid by.....	_____	.00	Include amounts paid for medical or dental insurance, or for treatment, and not reimbursed by others. Do not include insurance premiums paid by an employer.
insurance or otherwise reimbursed			

SECTION E – ASSETS AND LIABILITIES

Please enter current values for all information requested, Enter zero if applicable. Omit cents.

Current amount of money in cash, savings, checking, NOW accounts and Certificates of Deposit	_____	.00	Do not include any amounts maintained in tax deferred retirement accounts, such as an IRA
Current market value of stocks, bonds, mutual funds, money market accounts and other liquid investments	_____	.00	Do not include tax deferred retirement accounts such as an IRA, 401(k), 403(b), etc.
If you own your own home:			
How much did it cost?	_____	.00	Include the purchase price and the cost of any capital improvements.
What year was it purchased?	_____		
What is its fair value today?	_____	.00	Provide your best estimate of today's fair market value.
How much do you still owe on it?	_____	.00	Include mortgages and outstanding equity loan
If you own other real estate:			
What is its fair value today?	_____	.00	Include second homes, land and other real estate.
How much do you still owe on it?	_____	.00	(Do not include rental properties and property used in your own business.)
Student savings	_____	.00	Total savings for all students applying for aid through this application (those students for which the last column of Section C is filled out)
Assistance received from relatives (i.e. Grandparents)	_____	.00	
Loans (i.e. personal, student, other than credit cards)	_____	.00	

SECTION F - CERTIFICATION AND SIGNATURE

This form must be signed by all parents in Section A. Incomplete or unsigned applications will not be processed.

I (We) hereby certify that the information on this form and all attachments is complete and accurate to the best of my (our) knowledge.

_____	_____	_____
Certifying Parent or Guardian Printed Name	Parent or Guardian Signature	Date

_____	_____	_____
Certifying Parent or Guardian Printed Name	Parent or Guardian Signature	Date

Please remember to:

- ✓ answer each question, entering zero if applicable
- ✓ submit a copy of your 2011 tax return, including all attachments, schedules, 1099's and W2's by 3/15/12.
- ✓ include a \$25.00 check or money order payable to WMS for processing this application

NOTE: If your check is returned by your bank for any reason you will be assessed a fee of \$50.00. If the processing fee (and return fee, if applicable) is not paid by the final deadline your application will not be processed and you may be ineligible for aid.

***Please make sure that you complete section G.**

2012-2013 Financial Aid Application Information and Instructions

WHO SHOULD COMPLETE THE APPLICATION?

The application should be completed and submitted by the parent(s) or guardian(s) of child(ren) attending Wilmington Montessori School. If the parents are divorced or separated, the form should be completed by the custodial parent (the parent with whom the children live). Failure to complete and submit the form by the date shown on the form may result in ineligibility for an award of aid or may otherwise reduce the amount received.

New applicants to the school are welcome to submit Financial Aid applications. However, they will not be considered until the application process to the school is completed and an acceptance offered. Please note that preference is given to current students first.

IMPORTANT POINTS TO REMEMBER

- Type or print neatly using dark ink.
- Answer each question fully. Enter zero on the lines in sections D and E as applicable.
- Write only in the spaces provided. Do not write in the margins.
- Submit the original aid application to WMS. Keep a photocopy for your records.
- Be sure to submit the application and processing fee by **1/11/12**.
- Submit a copy of your 2011_Federal Income Tax Return (Form 1040, Form 1040A, Form 1040EZ) by **3/15/12**. Include a copy of all attachments, schedules, 1099's and W2's.
- In case of separation or divorce, additional documentation is needed: Custody agreement, child support agreement and spouse's tax forms as listed above.
- Return to Carolyn Fuhrman in a **sealed** envelope.
- Award Notification letters will be mailed on or about **2/15/12**.

SECTION A - PARENT OR GUARDIAN INFORMATION

Provide all of the information requested for each financially responsible adult living in the family home. Be sure to answer the questions regarding divorced or separated parents.

SECTION B - HOUSEHOLD INFORMATION

Provide the information requested regarding the family home, and number of persons that reside in the family home. Include children living at college if they do not maintain a separate residence, rely on the adults listed in Section A for their primary support, and maintain living space in the family home.

SECTION C - INFORMATION ABOUT DEPENDENTS

Print the full name and age of each child. The number of children named here should equal the number of children stated in Section B. Provide the school name, grade and tuition amount (to the best of your knowledge) for any of the children that attend a tuition-charging school, college, preschool or day care facility. Enter a grade of "D" for Daycare, "C" for College, "P" for Preschool. Include any amounts paid for the child's daycare in the tuition column. Finally, be sure to check the last column for each student that attends Wilmington Montessori School and that you wish to be considered for aid.

SECTION D - INCOME AND EXPENSES

Complete each line, entering zero if applicable. Omit cents (for example, report \$1234.56 as \$1234). Provide 2011 information for each parent listed in Section A. If there are two parents listed, and separate tax returns were or will be filed, add the amounts from each tax return to determine the appropriate response and submit copies of both tax returns with this application. Be sure to read the specific instructions for each line contained in the section.

SECTION E - ASSETS AND LIABILITIES

Complete each line, entering zero if applicable. Omit cents (for example, report \$1234.56 as \$1234). Provide the current fair value of the assets and liabilities owned by all parents listed in Section A. Be sure to read the specific instructions for each line.

SECTION F – CERTIFICATION AND SIGNATURE

All of the parents listed in Section A must provide a printed name, signature and the date that the form was completed. Incomplete or unsigned applications will not be processed. Please review the checklist at the bottom of the section before mailing your application.

SECTION G – SPECIAL CIRCUMSTANCES

If you expect or have incurred any significant financial changes which would affect the relevance of the information provided on the application (such as a job loss, promotion, etc.), or have other relevant circumstances (such as a grandparent that contributes to education), briefly explain the circumstances here. WMS may contact you for additional information.

Please Submit Application To:
Carolyn Fuhrman
Questions? Call Carolyn at 302-475-0555