

## 2009-2010 Tuition Assistance Application

Application must be received at 6651 SW Capitol Hwy., Portland, OR 97219 by January 15, 2009.

Please Note: Tuition Assistance will not exceed 50% off tuition.

There are a limited number of special scholarships available.

All information is held strictly confidential

We are pleased that you have chosen PJA for your child(ren). Tuition assistance is determined on the basis of need, timely submission of the application and registration forms, payment of the tuition deposit, and participation in the Fair share Program. To be considered for tuition assistance for the 2009-10 academic year, please complete all of this application and attach a copy of your signed and filed IRS 1040 for 2007 or foreign income tax return. Also, please note on the application any significant changes in income or resources from the previous tax year to the present.

- All parents must sign and return an IRS Form 4506, which is attached as a separate document. No fee is required with this form. This form enables PJA to get a copy of an applicant's tax return directly from the IRS. Independent schools use this form to ensure that the tuition assistance process is fair and complete. This is in addition to a copy of your tax form.
- Parents who are divorced or separated are required to have both birth parents and step-parents submit financial information (use separate application forms). The only exception is if there is a court order mandating that one parent provide all support for the child. In that case, please attach a copy of the court order. Again, this policy is instituted to make the tuition assistance process fair and complete and to ensure an accurate picture of a family's total finances.
- No application will be considered unless all past due balances are brought up to date or a payment arrangement has been accepted by PJA.
- Parent(s) or responsible guardian(s) must sign this form at the end of the application. Your signature certifies that all information recorded is correct.
- Determination of aid is solely the responsibility of the PJA Tuition Assistance Committee. This committee considers all submitted information and individual financial aid decisions to be strictly confidential.
- Final award is contingent upon evaluation of your 2008 income tax forms which need to be submitted to PJA by April 15, 2009
- Please do not hesitate to contact Inge Hoogerhuis, Admission Director, 503-535-3599, if you have any questions.

# PORTLAND JEWISH ACADEMY

6651 SW Capitol Highway, Portland, OR 97219 P: 503.244.0126 F: 503.452.7001 www.portlandjewishacademy.org

## PARENTS' CONFIDENTIAL STATEMENT

Names of all children in your family	PJA Aid Application (Y/N)	School	Grade entering in 2009-10	Amount you paid in 2008-09	Estimated amount you can pay annually

Parent #1 \_\_\_\_\_ Home Phone \_\_\_\_\_

Address/Zip \_\_\_\_\_ Work Phone \_\_\_\_\_

Parent #2 \_\_\_\_\_ Home Phone \_\_\_\_\_

Address/Zip \_\_\_\_\_ Work Phone \_\_\_\_\_

## INCOME AND EXPENSES

1. Please attach a copy of your current income tax return(s). If the student's father and mother file separately or are separated or divorced, please forward returns of both parents and step-parents (each can be under separate cover). If a tax form was not filed, your sources of income must be recorded (see #7).

2. Principal wage earner's occupation \_\_\_\_\_

Yearly salary or income \$ \_\_\_\_\_ Employer \_\_\_\_\_

Occupation of other parent \_\_\_\_\_

Yearly salary or income \$ \_\_\_\_\_ Employer \_\_\_\_\_

Occupation of step-parent and/or non-custodial parent \_\_\_\_\_

Yearly salary or income \$ \_\_\_\_\_ Employer \_\_\_\_\_

3. Do you own your home? Yes \_\_\_\_\_ No \_\_\_\_\_ my monthly rent is \$ \_\_\_\_\_

Fair market value:

Per property tax assessment \$ \_\_\_\_\_

Per your estimate \$ \_\_\_\_\_

Monthly mortgage payment - principal and interest \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Unpaid principal mortgage balance \$ \_\_\_\_\_

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4. Do you own other property? Yes \_\_\_\_\_ No \_\_\_\_\_

Fair market value less mortgages \$ \_\_\_\_\_

Location \_\_\_\_\_

Monthly mortgage payment - principal and interest \$ \_\_\_\_\_

Insurance \$ \_\_\_\_\_

Property taxes \$ \_\_\_\_\_

Unpaid principal mortgage balance \$ \_\_\_\_\_

5. Do you own or partially own any business? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please complete the following:

a. Total capital value of your ownership/partial ownership interest in the business: \$ \_\_\_\_\_

b. Your share of the last full year earnings of the business: \$ \_\_\_\_\_

6. Please list value of holdings in other investments.

a. Savings accounts \$ \_\_\_\_\_

b. Money market funds \$ \_\_\_\_\_

c. Other investments (to include, but not limited to trust funds, CDs, stocks, bonds, etc.) \$ \_\_\_\_\_

d. Cash value of life insurance \$ \_\_\_\_\_

e. Current value of pensions (including IRAs, 401Ks, employer sponsored pensions, etc.) \$ \_\_\_\_\_

f. Trusts of which you or your children are the beneficiaries \$ \_\_\_\_\_

7. Untaxed or other income for the calendar year.

a. Child support (for all children) \$ \_\_\_\_\_

b. Alimony payments received or household expenses paid by the separated or divorced spouse in lieu of alimony \$ \_\_\_\_\_

c. Social Security benefits \$ \_\_\_\_\_

d. Aid to Families with Dependent Children or ADC, record total for the year \$ \_\_\_\_\_

e. Food stamps, yearly total \$ \_\_\_\_\_

f. Other \$ \_\_\_\_\_

8. Have you incurred significant debt because of serious illness, disability, or accident? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain \_\_\_\_\_

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

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9. Are there any unusual family circumstances that should be considered by PJA's Tuition Assistance Committee in awarding financial assistance? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please explain \_\_\_\_\_

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## **FAIR SHARE PROGRAM**

I understand that I must participate in Portland Jewish Academy's Fair share Program, which is a collaborative effort by all PJA families to provide a high quality education for our students and to reduce expenditures through parental volunteer work. All parents have an obligation to participate in this program. ***Each family must contribute a total of 18 hours per year doing such jobs as: working on the auction, selling grocery scrip, helping in the classroom, etc.***

Parent(s) to initial here: \_\_\_\_\_

I (we) attest to the accuracy of this application

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

## **PARENT CHECKLIST FOR PJA TUITION ASSISTANCE APPLICATION**

- \_\_\_\_\_ If you are new to PJA, you have applied for admission.
- \_\_\_\_\_ You have paid the application fee or tuition deposit.
- \_\_\_\_\_ You are enclosing a copy of your **signed, filed** IRS 1040 or foreign income tax return.
- \_\_\_\_\_ Both parents in a family, where parents are divorced or separated, provided financial information. If not, attach a copy of the court order.
- \_\_\_\_\_ You are up-to-date with all outstanding balances or have made an arrangement with PJA.
- \_\_\_\_\_ You initialed the Fair share paragraph.
- \_\_\_\_\_ You signed this tuition assistance application form.