

**HAWTHORNE VALLEY WALDORF SCHOOL
TUITION ADJUSTMENT APPLICATION 2012 – 2013**

1. Please fill out this form completely and return it signed with your tax forms by **February 13, 2012**
2. Attach a separate **written narrative (maximum of 2 pages)** describing your circumstances to help the tuition adjustment committee gain a more complete and accurate picture of your financial situation

Parent, Caregiver, Guardian

Parent, Caregiver, Guardian

Name	Age	Name	Age
Home Address	Phone	Home Address	Phone
City, State	Zip	City, State	Zip
Mailing Address if different		Mailing Address if different	
Occupation	Title	Occupation	Title
Employer	Yrs. on job	Employer	Yrs. on job
Address	Phone	Address	Phone
Educational Degrees or certificates		Educational Degrees or certificates	
Social Security #		Social Security #	

- | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> Married
<input type="checkbox"/> Widowed
<input type="checkbox"/> Never Married
<input type="checkbox"/> Sharing expenses with domestic partner | <input type="checkbox"/> Divorced
<input type="checkbox"/> Legally Separated
Date of divorce or separation ____/____
<input type="checkbox"/> Separated, no court action |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Name of parent who claimed student as tax exemption for 2011 _____

Noncustodial Parent Information

Name: _____

Home Address: _____

Phone: _____

Occupation: _____

Employed by: _____

Title: _____

Non-custodial parent's tuition payment obligations: _____

SECTION A: TUITION OBLIGATIONS

Current Year (2011-2012) Information for all Dependents who have Tuition

(Including yourself or other household members)

Name and relationship	Name of School/College	Year/Grade	Age	Total Tuition for 2011-2012	Did you apply for aid?	Financial Aid Awards	Amount Paid by Others	Amount Paid by Loans	Amount Paid by You
				\$		\$	\$	\$	\$

Students Attending Hawthorne Valley Waldorf School 2012 – 2013

First and Last Name	Grade	Full Tuition Cost	Kindergarten and/or Grade 1 Afternoon Cost	Total Tuition Cost

Total amount of 2012-2013 Tuition for all enrolled children: \$	*
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*copy this figure to the space provided on page 8

Next Year (2012-2013) Information for all Dependents who will have Tuition

(Including yourself or other household members)

Name and relationship	Name of School/College	Year/Grade	Age	Total Tuition for 2012-2013	Did you apply for aid?	Amount to be paid by			
						Child Support	Student's Assets, Social Security or Trust Fund	Student's Earnings	You
				\$		\$	\$	\$	\$

SECTION B: INCOME AND ASSETS

Names of all other members in household	Age	Relationship

List Other Sources of Tuition Support. If you anticipate any of these sources, you must fill out this section. (Such as Domestic Partner, Grandparents, Relatives, Friends, Trusts, Scholarship funds, Private sponsorships, etc.)

Source of support	Description	Amount
		\$
		\$
		\$
		\$

List Other Sources of Monetary Support; (money for expenses other than tuition)

Source of support	Description	Amount
		\$
		\$
		\$
		\$

Family Employment (Include unemployment and/or social security income)

Person	Job	Hourly Wage	Hours/Week	Weeks/Year	Income/Year
					\$
					\$
					\$
					\$

Employment Benefits

Please detail employment benefits and their monetary value for 2012 for each employed person		
Utilities:		
Tuition:		
Travel:		
Provided housing (fair market value):		
Provided auto:		
Life Insurance:		
Medical Insurance:	Dental:	Eye:
Pension Plan (please describe)		
Other:		

SECTION B continued

Business/Farm/Self-Employment Income (Please complete and return the Business/Farm Supplement with this application. Use Net Income from Line K of Business/Farm Supplement here.)

Person	Description	Estimated 2012 Net Income

Current Assets (not counted as income)

Asset	Description	Total Value
Savings, Cash, Money Market Accts.		
Trust funds		
Mutual Funds		
Securities		
IRA(s), 401k(s), Keogh(s), 503B7, other		
Children’s Savings		
Children’s mutual funds, trusts, securities, etc.		
Other Assets (foreign, etc)		
	Total	\$

Home Ownership

Year home purchased		Have you refinanced your home? Yes <input type="checkbox"/> No <input type="checkbox"/>
Purchase price \$		Year of second mortgage/equity loan
Total Home Insurance carried \$		Amount of second mortgage/equity loan \$
Present Market Value \$		Annual payments on second mortgage \$
Number of acres owned on primary residence _____ (include value in house value estimate above)		Describe & estimate cost for repairs, etc. 2012-13
Principle due on mortgage \$		
Total annual payments on all mortgages and equity loans \$		

Other Real Estate

Year Purchased			
Description (include acreage)			
Purchase Price	\$	\$	\$
Total Fire Insurance	\$	\$	\$
Present Market Value (include acreage)	\$	\$	\$
Total annual mortgage payments	\$	\$	\$
Describe & estimate cost for repairs, etc. 2012-13			
Rental Income	\$	\$	\$

SECTION B continued

Income Summary

Source	Total Income Jan-Dec 2011	Total Estimated Income Jan-Dec 2012	Names of Earner
First Person Wages – Total all jobs			
Second Person Wages – Total all jobs			
Cash income (tips, etc) (kept confidential)			
Other tuition support amount			
Other monetary support amount			
Grants			
Income from Trust Funds			
Investment/interest income			
Rental income			
Veterans benefits			
Food stamps, SSI, WIC, Welfare			
Unemployment income			
Social Security income			
Disability Payments			
Child Support			
Profit from Business/Farm/Self-Employed			
Other household contributors			
Total Income		* \$	

* copy this figure to the space provided on page 8

SECTION C: EXPENSES AND DEBTS

Family Cars Owned or Leased and other non monetary assets

Make and Year	Current Car Debt
Make and Year	Current Car Debt
Make and Year	Current Car Debt
List other assets such as boats or other valuables	Estimated Value or current debt
List other assets such as boats or other valuables	Estimated Value or current debt

Existing Credit Card and Other Loan Debt (as of most recent statement)

Debt/Loan	Description	Total Owed
Credit Card(s)		
Student Loan(s)		
Other Loan(s)		
	Total Owed	\$

Anticipated Additional Debts/Loans for School Year 2012-2013

Description (include new/refinanced mortgages and loans)	Total

Estimated Household Expenses for Calendar 2012 – YOU MUST FILL OUT ALL ITEMS ON THIS PAGE

Please detail specific expense categories and include dollar amounts for each for calendar 2012 (estimate when necessary).

Write N/A for items that do not apply. Attach additional sheets as necessary.

<i>Taxes</i>	<i>Insurance</i>	<i>Out of Pocket Health Care</i>	<i>Utilities</i>	<i>Vehicles</i>	<i>Child Care</i>	
Federal	Life	Physicians	Gas/Oil	Gasoline	Day Care	
State	Auto	Dental	Electric	Maintenance	After School Care	
Property	Home	Hospital	Wood/Coal	Registration	HVS KG or 1 st grade	
Other	Health	Pharmacy	Phone	Other	Afternoon Program	
	Dental	Eye Care	Cell Phone(s)		Special Care	
	Other	Other	Internet		Camp	
			Other		Other	<u>TOTALS</u>
Total Taxes	Total Ins.	Total Health	Total Utilities	Total Vehicles	Total Care	
<i>Personal Care</i>	<i>Entertainment</i>	<i>Vacation</i>	<i>Lodging</i>	<i>Home Care</i>	<i>Charitable Gifts</i>	
Clothing	Cable	Lodging	Mortgage Payments	Repairs	Cash Donations	
Supplies	Movies/Plays	Travel		Maintenance	Donated Goods	
Services	Concerts	Expenses	Rent	Improvements	Donated Services	
Other	Sports	Meals		Supplies	Other	
	Other	Other		Other		<u>TOTALS</u>
Total Personal	Total Ent..	Total Vac.	Total Lodging	Total Home	Total Gift	
<i>Tuition (Non-HVS)</i>	<i>Educational Expenses</i>	<i>Food</i>	<i>Animal Care</i>	<i>Loan and Credit Card Payments (total for 2012)</i>	<i>Retirement/ Savings</i>	
	Tutoring	Groceries	Pets	Credit Cards	Pension Plans	
	Music Lessons	Dining	Livestock	Student Loans	Other	
	Extracurricular Activities	Other		Vehicle Loans		
				Other		<u>TOTALS</u>
Total Tuition	Total Educ.	Total Food	Total Animal	Total Payments	Total Other	

GRAND TOTAL OF ESTIMATED EXPENSES FOR 2012 ON THIS PAGE \$ _____ *

*copy this figure to the space provided on page 8

SECTION D: TUITION REQUEST

This section must be completed for your Tuition Adjustment Application to be processed. As a point of policy, the TA Committee does not award 100% assistance. Incomplete forms or forms requesting 100% assistance will be returned.

Total of estimated 2012 income from income summary on page 5	\$
Total of estimated 2012 expenses on page 7	\$
Tuition you were required to pay on your 2011-2012 HVS contract	\$
Total amount of the 2012-2013 tuition for your children (from page 2)	\$
Amount of tuition that can be paid from all income sources for 2012-2013	\$

I confirm that the information submitted above is true and complete to the best of my/our knowledge. (Hawthorne Valley Waldorf School reserves the right to modify or revoke any reduction decisions if information is purposefully withheld or misrepresented.) We give Hawthorne Valley Waldorf School permission to obtain financial information such as credit ratings and tax filings in order to confirm the amounts entered in this document.

I/we understand that the information will be treated confidentially by the school.

Signature of Parent/Caregiver/Guardian

Date

Signature of Parent/Caregiver/Guardian

Date

This 8 page application must be fully completed before it can be processed.

Please indicate that you have completed/attached the following:

- Narrative cover letter**
- This application, complete and signed**
- Business/Farm/Self Employment form, if applicable**
- Completed and signed Tax Return or W-2 or 1099**