



# Apple Orchard School

Where children grow. Inside and out.

Dear Parents,

The goal of the scholarship program is to provide a unique learning opportunity for as many different families as possible. Approximately 15-20% of our student population receives some financial assistance. The number of requests for assistance has increased steadily over the past few years.

## **APPLICATION TIMELINES**

**Current and alumni families - Please submit the application before December 15<sup>th</sup>.**

**New families for Pre-Class I or Class I – Please submit the application by January 15<sup>th</sup>.**

**New families for Class II or Class III - Please submit the application by February 16<sup>th</sup>.**

The guidelines below were developed to help answer any questions in regard to our scholarship program. Please read the following guidelines carefully:

- ✚ Tuition assistance is primarily for the morning program (8:15 a.m. - 12:00 p.m.).
- ✚ Families granted a scholarship for the morning program are not guaranteed assistance for the afternoon Sandwich Club program.
- ✚ Parents need to apply annually for tuition assistance. Please download a scholarship application from our website or call 617-731-6463 to request one.
- ✚ Generally, in an effort to assist as many families as possible, we can only provide assistance to one child, per family, each year.
- ✚ If all children within the family are attending school, it is required that both parents must be employed or attending graduate school in order to qualify for tuition assistance.
- ✚ Along with the application, you must include copies of your 2016 tax returns; copies of 2017 returns should be forwarded as soon as possible.

Thank you for your interest in the Scholarship Program. Please do not hesitate to contact Dee Bunstein in the Business Office with any questions at 617-731-6463.

**APPLE ORCHARD SCHOOL  
SCHOLARSHIP APPLICATION**  
**School Year 2018 - 2019**

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

NAME OF STUDENT APPLICANT: \_\_\_\_\_

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

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

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:

Employed by:

Years in current job:

Full or part-time?

Work phone:

Other jobs?

**PARENT / GUARDIAN 2**

Name:

Age:

Home Address:

Home Phone:

Occupation:

Title:

Employed by:

Years in current job:

Full or part-time?

Work phone:

Other Jobs?

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

Name of parent claiming student as a tax dependent in 2017 \_\_\_\_\_

Is there a court ordered agreement specifying a contribution for this child's educational expenses? \_\_\_\_\_ YES \_\_\_\_\_ NO

**PARENTS' ANNUAL INCOME AND EXPENSES**

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

1) <u>Taxable Income:</u>	2017	Estimated 2018
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>	2017	Estimated 2018
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>	2017	Estimated 2018
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)	_____	_____

	2017	Estimated 2018
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? and/or 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	Child 4
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:	_____	_____
(Currently in School) 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 2017 and amount expected to be given in 2018:

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

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 2017	_____	_____
Rent expected in 2018	_____	_____

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

	#1	#2	#3	#4
Make	_____	_____	_____	_____
Model	_____	_____	_____	_____
Year	_____	_____	_____	_____
Own Outright	_____	_____	_____	_____
Part Owner	_____	_____	_____	_____
Monthly Payments	_____	_____	_____	_____
Payment Termination Date	_____	_____	_____	_____

I. Complete the following (only if you own a business):

Percentage of ownership? \_\_\_\_\_ %  
Assets \_\_\_\_\_  
Liabilities \_\_\_\_\_

9) OBLIGATIONS / INDEBTEDNESS:

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

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B.    If members of clubs requiring dues/fees, please list names and amounts of yearly dues or fees:

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C.    Total employment-related day care expenses (2017)  
Important - do not include school tuition here school tuition was itemized previously

Total daycare expenses in 2017                                      \$ \_\_\_\_\_

D.    Costs of summer camps in 2017                                      \$ \_\_\_\_\_

E.    Costs of family vacations in 2017                                      \$ \_\_\_\_\_

F.    Costs of lessons/activities in 2017  
for family members (music, sports, dance, etc.)                                      \$ \_\_\_\_\_

10) FAMILY ASSISTANCE:

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

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

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11. In reviewing your family's financial situation, please indicate the amount you think you can pay in 2018 - 2019 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 from any other school (s)? \_\_\_\_\_ YES \_\_\_\_\_ NO

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

**STATEMENT FROM PARENTS:** We encourage you to make additional comments, which you think will help the Financial Assistance Committee understand your family's financial situation. (Attach separate pages as needed)

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

\_\_\_\_\_ Enclosed are full copies of my original signed and dated (2016) Tax Returns and all schedules.

\_\_\_\_\_ Enclosed are copies of my 2016 W2 Forms.

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

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

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

**REMINDER: 2017 TAX FORMS must be submitted once filed**