

*Great Barrington  
Waldorf  
High School*

**Application for Tuition Assistance**

Please complete this form, attach copies of the documents listed below and return to the school business office. The sooner you file, the sooner your application can be reviewed.

Father's Name: \_\_\_\_\_ Telephone #: \_\_\_\_\_

Mother's Name: \_\_\_\_\_ Telephone #: \_\_\_\_\_

List of Required Documents:

*Please include all applicable items; incomplete applications will be returned to you.*

\_\_\_\_\_ Completed School Tuition Level Assessment Application

\_\_\_\_\_ Completed Net Worth Statement.

\_\_\_\_\_ IRS TAX FORM 1040 (or alternate form) from most recent year, completed and signed with all attached schedules

\_\_\_\_\_ Business or farm owners, IRS Schedule C

\_\_\_\_\_ Copy of your most recent Property Tax Bill, showing assessed value of the property for \_\_\_\_\_ Primary Residence \_\_\_\_\_ Other Real Estate

\_\_\_\_\_ On page 2 of this application please remember to:

\_\_\_\_\_ List all assets held

\_\_\_\_\_ Explain special circumstances

\_\_\_\_\_ Indicate whether or not you wish to have an interview

**GIFT OPTION:** GBWHS desires to build resources sufficient to support Financial Aid. As your family economics change in the future, any gifts you make would enhance our capacity to make assistance available to more families.

Thank you.

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List all amounts held in:

	Parents' Names	Children's Names
1. Savings Accounts	\$ _____	\$ _____
2. Checking Accounts	\$ _____	\$ _____
3. Retirement Accounts	\$ _____	\$ _____
4. IRA	\$ _____	\$ _____
5. Stocks	\$ _____	\$ _____
6. Bonds	\$ _____	\$ _____
7. College Accounts	\$ _____	\$ _____
8. Other Investments	\$ _____	\$ _____

Special Circumstances: (Explain here)

Would you like an interview?       Yes       No

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*All of the information I have submitted in this application and in the Tuition Level Assessment Application is true and complete to the best of my knowledge. I have not concealed or withheld any information pertaining to assets, savings, or income for myself or for my children.*

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Parent signature

Date

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Parent signature

Date

The Great Barrington Waldorf High School does not discriminate on the basis of race, color, creed, national or ethnic origin, marital status, sexual orientation, or Veteran status in the allocation and administration of financial aid programs.

## Net Worth Statement

**Name (s):** \_\_\_\_\_

Assets	
Personal Items	Estimated Value
Home	\$
Vehicles	
Jewelry	
Artwork	
Furniture	
Electronics	
Antiques	
Other	
Cash or Cash Equivalent	
Checking account	\$
Savings account	
Certificates of deposit	
Money market account	
Life insurance policies (cash value)	
Other	
Investments	
Retirement account	\$
Bonds	
Mutual funds	
Individual stock shares	
Real estate other than home	
Other	
<b>Assets Total</b>	<b>\$</b>

Liabilities	
Loan Balances	Estimated Value
Mortgage loan	\$
Home equity loan	
Car loans	
Real estate loans	
Student loans	
Other loans	
Other Outstanding Debt	
Credit card debt	\$
Other debt	
<b>Liabilities Total</b>	<b>\$</b>

**FAMILY DATA**

Parent(s) Name	Phone #
Complete Address	
Occupation(s)	Phone #
Best Time & Place to Call	

Are you 100% responsible for tuition? If not, please explain:

**CURRENT YEAR EDUCATION EXPENSE**

Student Name	Age	School/College	Tuition	Your Share
			\$	\$
			\$	\$
			\$	\$
			\$	\$
			\$	\$
<b>Total Tuition excluding discounts:</b>				\$

**INCOME / EXPENSE PROJECTION - Coming School Year**

	Monthly	Annual
Total Monthly Income (from page 4)	\$	\$
Total Monthly Expenses (from page 4)	\$	\$
Net Income (Income less Expenses)	\$	\$
Tuition Amount Willing to Pay	\$	\$
<b>Total Tuition Adjustment requested (Total tuition less annual amount able to pay):</b>		\$

**OTHER RESOURCES**

Name(s) of Individual or relative making tuition contributions:	-	\$
Equity in Real Estate (Current value less debt balance)		\$
Liquid Assets (from page 2 items 1 & 2)		\$
Other assets (from page 2 items 3 through 8)		\$

