



Financial Aid Application Worksheet 2024-2025 School Year

Completing the application online is easy, fast, and secure.
Visit <http://www.mytads.com/> to start the application.

This is a worksheet to help you prepare to fill out the TADS Financial Aid Application and WILL NOT be accepted as an application.

You will need the following supporting documentation before you begin:

- Most recently filed federal taxes
- Most Recent W-2's received by all Parents/Guardians listed on the application
- Recent pay stubs of jobs that Parents/Guardians currently hold
- All documentation that establishes how much miscellaneous monthly or yearly income you currently receive (i.e. welfare, food stamps, unemployment, workers' compensation)
- All corporate, partnership, and trust tax forms if a Parent/Guardian owns 20% or more interest in a corporation or partnership, or if any member of the household owns 20% or more interest in a trust
- Other documentation (recent utility bills, daycare expense, etc.,) may be required

SECTION 3: List all jobs held by Parent(s)/Guardian(s) since January 1, 2023, even if no longer at this job

If a Parent/Guardian only received a Form 1099, enter that in Section 4.

Wages, Tips, Other Compensation:

This value can be found in Box 1 of your 2023 W-2. If you do not have your 2023 W-2 yet, use the year-to-date total off of your last December 2023 paycheck. You may fax the W-2 in later as long as it is before the application deadline.

Employer Name _____	2023 Wages, Tips & Other Compensation _____
	2024 Est Wages, Tips, Other _____

SECTION 4: List Business, Farm, Corporation, Partnership, Trust, and Miscellaneous Income since January 1, 2023

Complete this section even if the business recently closed or has just opened. Find your relevant tax form below and enter the corresponding line number values for each field on the application. For example: If you filed Form 1065 because you are involved in a Partnership, you should find 'Partnership - Form 1065' in the section below. You will then notice that there are two numbers, 1. and 2. Listed after each number is the action you need to take for that item. Continuing with the Partnership example, you would look at 1. and notice that it says "Line 22". Find Line 22 on the Partnership Form 1065 and enter that number into 1. 2023 Actual Net Profit on this application.

2023 Actual Net Profit _____

2023 Actual Depreciation _____

2024 Estimated Net Profit _____

Group 1: No additional fee is required if you submitted tax documentation to the federal government for the following group:

Group 2: An additional processing fee is required if you submitted tax documentation to the federal government for the following group:

- | | |
|--|---|
| <ul style="list-style-type: none"> • Miscellaneous Income - Form 1099: 1. Line 7, 2. Leave blank • Business Schedule C: 1. Line 31, 2. Line 13 • Business Schedule C-EZ: 1. Line 3, 2. Leave blank • Farm - Schedule F: 1. Line 34, 2. Line 14 • Estates and Trusts - Form 1041: 1. Line 22, 2. Leave blank • Partnership - Form 1065: 1. Line 22, 2. Line 16c | <ul style="list-style-type: none"> • Corporation (Short Form) - Form 1120-A: 1. Line 26, 2. Line 20c • Corporation - Form 1120: 1. Line 30, 2. Line 20 • S Corporation - Form 1120S: 1. Line 21, 2. Line 14c |
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SECTION 5: Other Monthly Income

Welfare Income _____	Monthly Social Security for: Parent(s)/Guardian(s) _____
Food Stamps _____	Dependents under 19 _____
Child Support _____	Elderly Dependents _____
Alimony _____	

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SECTION 6: Yearly Income

Actual 2023

Estimated 2024

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Note:

2023 Interest & Dividends: This value is found by adding lines 2a, 2b, and 3b on your 1040 tax return form.

Interest & Dividends

Yearly Workers' Compensation

Yearly Unemployment

Miscellaneous Yearly Income

_____	_____
_____	_____
_____	_____
_____	_____

SECTION 7: If You Pay Rent

Enter the amount you pay for rent alone; do not include utility expenses unless they are built in to your monthly rental payments.

Monthly Rent

Yearly Renters' Insurance

SECTION 8: Yearly Energy Expenses (renters and homeowners)

If you rent, do not include these expenses if they are already included in monthly rental payments. Homeowners should report expenses.

Gas, Oil, Coal

Electricity

Water, Sewage

SECTION 9: Assets and Expenses – Home

Year of Purchase

Purchase Price

Improvements/Additions

Current Market Value

Amount Owed on Home Loans & Mortgages

2023 Property Tax

2023 Home Insurance

Monthly Mortgage Payment

2023 Rental Income (if applicable)

2023 Rental Expenses (if applicable)

SECTION 10: Assets and Expenses – Real Estate other than Home

Fill out this section if you own any other properties in addition to your home, including rental properties, land, etc.

Purchase Price of all Properties

Cost of Improvements/Additions

Current Market Value

Amount Owed for all Properties

Paid on loan or mortgage amounts.

Total Monthly Loan/Mortgage Payment

2023 Gross Property Income

2023 Gross Property Expenses

SECTION 11: Assets and Debt – Automobiles

Information for vehicles that you own

of Vehicles

Total Current Market Value

Total Debt

Information for vehicles that you lease

of Vehicles

Total Monthly Lease

Yearly Insurance Cost for All Vehicles

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SECTION 12: Assets – Recreational Vehicles/Boats

Value: Include market value for all recreational vehicles that you own. A few examples of recreational vehicles are: Motor homes, boats, motorcycles, all-terrain vehicles, personal watercrafts, snowmobiles and dune buggies.

Value _____

Debt _____

Debt: Please list amount you owe for all of the recreational vehicles that you own.

SECTION 13: Assets – Cash, Stocks, etc.

Checking, Savings, Cash, CD's: _____
List current value of these accounts, along with cash on hand.

Checking, Savings, Cash, CD's _____

Stocks, Securities, Bonds, Mutual Funds: _____
List current value of these accounts.

Stocks, Securities, Bonds, Mutual Funds _____

SECTION 14: Assets – Retirement Plans

Current Value Self Managed (IRA, SEP, etc.) _____

Current Value Other Managed (401k, etc.): _____

2023 Contribution–Employer _____

2023 Contribution–Household _____

SECTION 15: Medical Expenses

2023 Medical/Dental Payments _____	2023 Prescription Eyewear Insurance _____
2023 Prescription Drugs Payments 2023 _____	Debt from Prescription Eyewear _____
Medical/Dental Insurance _____	Debt from Prescription Eyewear _____
2023 Prescription Drug Insurance _____	

SECTION 16: Alimony and Child Support Expenses

Child Support Paid to Others(2023) _____	Estimated Child Support to be paid to Others(2024) _____	Alimony Paid to Others (2023) _____	Estimated Alimony to be Paid to Others (2024) _____
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SECTION 17: Day Care and/or Elderly Care Expenses (include summer camp expenses)

Dependent Name	2023 Payments	Estimated 2024 Payments

SECTION 18: Charitable Giving (list your three largest contributions)

If you made tax deductible donations to non-profit organizations in 2023, list the three organizations you donated the most to and the amount of those donations.

Charity Name	2023 Contributions

SECTION 19: Miscellaneous Debt (do not list debt on home or property, medical debt, debt for cars, boats, or other vehicles)

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List the total outstanding dollar amount in each item. Do not include medical debt, vehicle debt, home loans, second mortgages or home equity loans. If you have more than one credit card, add all card balances together and enter the total amount. Documentation of any debt may be required.

Credit Card: _____
Bank Loans: _____
Loan Companies: _____
Other Debt: _____

Loans–Friends or Relatives: _____
Education–Parent(s)/Guardian(s): _____
Education–Dependents: _____

SECTION 21: Contributions to Education (2024–2025)

Enter the amount you can realistically contribute from the following sources towards the education of the children on this application:

Parent(s)/Guardian(s): _____
non-custodial parent ordered by law _____
Other Sources _____

SECTION 23: List all Dependents in the Household; do not include Parent(s)/Guardian(s)

If you have more than five dependents, please submit this application and then contact Tads to add any additional Dependents.

Definition of "Dependent": Any child that you can claim on your 1040 tax form is a dependent. In addition, any child who is living in your household for six months or more per year and who is under age 18 qualifies as a dependent. If you are a non-custodial parent, all children applying for financial aid should be listed as dependents, even if not living in your household and not on your taxes. Do not list Parents/Guardians in this section.

Dependent Number	Dependent Earnings in 2023	Dependent Current Savings	529 Savings Plan	Amount Dependent can contribute to education from earnings/savings for school year 2023-24	Expenses- Bus, Books, Uniforms, Fees, etc.
#1					
#2					
#3					
#4					
#5					

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When you are ready to fill out an online application, go to www.mytads.com, click on 'Financial Aid' and follow directions.

WORKSHEET

DO NOT SUBMIT

Contact TADS

E-mail, Telephone:

We are available to assist you with questions in filling out your application or to check the status of your application through the following:

E-mail: tads-support@communitybrands.com

Toll-free: 1.800.477.8237 We are available Monday through Friday, 8:00 a.m. to 6:00 p.m. Central Time.

Telephone: 612.548.3320 We are available Monday through Friday, 8:00 a.m. to 6:00 p.m. Central Time.