



# 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"> <li>• Miscellaneous Income - Form 1099: 1. Line 7, 2. Leave blank</li> <li>• Business Schedule C: 1. Line 31, 2. Line 13</li> <li>• Business Schedule C-EZ: 1. Line 3, 2. Leave blank</li> <li>• Farm - Schedule F: 1. Line 34, 2. Line 14</li> <li>• Estates and Trusts - Form 1041: 1. Line 22, 2. Leave blank</li> <li>• Partnership - Form 1065: 1. Line 22, 2. Line 16c</li> </ul> | <ul style="list-style-type: none"> <li>• Corporation (Short Form) - Form 1120-A: 1. Line 26, 2. Line 20c</li> <li>• Corporation - Form 1120: 1. Line 30, 2. Line 20</li> <li>• S Corporation - Form 1120S: 1. Line 21, 2. Line 14c</li> </ul> |
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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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Note:  
2023 Interest & Dividends: This value is found by adding lines 2a, 2b, and 3b on your 1040 tax return form.

	Actual 2023	Estimated 2024
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	_____

### 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.

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

Value \_\_\_\_\_

Debt \_\_\_\_\_

### SECTION 13: Assets – Cash, Stocks, etc.

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

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

Checking, Savings, Cash, CD's \_\_\_\_\_

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)
_____	_____	_____	_____

### 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](http://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](mailto: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.