

**Guardian Angel
Application Form
2019-2020**

Please mail to: Guardian Angel
C/O Holy Spirit Catholic School
770 W. Ramsey
San Antonio, TX 78216

Attn: Business Office Manager

TO COMPLETE THIS APPLICATION YOU WILL NEED TO INCLUDE:

1. Detailed copies of all pages and schedules of your 2018 or 2017 Federal Income Tax Return Form 1040, 1040A, or 1040EZ (**as filed with the IRS**) for individuals listed in Sections A and B. Recaps and/or Summary Forms are not acceptable. If you file Schedule E with your tax return for a Partnership or S Corporation, you must provide copies of your Schedule K-1. Also, provide Form 1065 and/or Form 1120S (as applicable). If you are not required to file a tax return, please provide Year End documentation for line items in Section G.
2. Copies of all 2018 or 2017 W-2 Wage Tax Statement Forms, all 2018 or 2017 1099/1099R for Interest/Dividends, Pensions/Annuities and/or Misc. Income Forms for individuals listed in Sections A and B. (**Please make sure all documentation is copied on regular 8 ½ x 11 paper.**)
3. Documentation of TOTAL AMOUNTS received in 2018 for all Non-Taxable Income (see Section G for specific requirements).

IMPORTANT: If the above items do not accompany this application, your application will not be processed.

For returning families this form must be postmarked no later than July 26, 2019 to be considered for the August awards.

For new families this form must be postmarked no later than July 31, 2019 to be considered for the October awards.

Awardees will be notified by mail as soon as possible thereafter.

Please do not call to check on the processing status of your application.

Keep a copy of this application.

STUDENT AID FORM • 2019 – 2020

• IMPORTANT: Print clearly and neatly with a ball point pen •

A Parent, Guardian or Older Adult Responsible for tuition

Circle one: Father Mother Stepfather Stepmother Other Adult

Last Name First Name MI

Social Security Number Age () Home Phone
(Area Code)

Address Apt #

City State Zip

Occupation/Title/Rank () work phone
(Area Code)

E-mail address

If you are self-employed, check this box and complete Section J of this form.

Employed by How Long?

May Guardian Angel contact you at work if there are questions?
 yes no

B Parent, Guardian or Older Adult Responsible for tuition

Circle one: Father Mother Stepfather Stepmother Other Adult

Last Name First Name MI

Social Security Number Age () Home Phone
(Area Code)

Address Apt #

City State Zip

Occupation/Title/Rank () work phone
(Area Code)

E-mail address

If you are self-employed, check this box and complete Section J or this form.

Employed by How Long?

May Guardian Angel contact you at work if there are questions?
 yes no

C Household Information

1. Number of individuals who will reside in my/our household during the 2019-2020 school year:

Parents/Guardians Children Other

If Other, please explain relationship to Parent

2. Current marital status/housing arrangements of Parent/Guardian A:

- a. single, never married
- b. married
- c. widowed
- d. divorced
- e. divorced/remarried
- f. separated
- g. residing w/ other adult
- h. other

If Divorced, Divorce/Remarried, Separated, or Single, please complete Section D.

D Divorced or Separated Parents (to be completed by parent or guardian listed in Section A)

1. Date of Separation (Month/Year)

2. Date of Divorce (Month/Year)

3. Non-custodial parent Last name First name MI

4. Do you receive or pay child support? Receive Pay Neither

5. Total amount of child support received for all children in 2018 by Parent/Guardian A and Parent/Guardian B. \$

6. According to court order, when will child support end? (Month/Year)

7. Total amount of child support paid for all children in 2018 by Parent/Guardian A and Parent/Guardian B. \$

8. Who is responsible for the tuition for the dependent(s) listed in section E?
 Father % Mother % Other %

If tuition is shared, each responsible party must complete a Guardian Angel Tuition Form.

9. Who claimed student(s) as a tax dependent in 2018?

E Dependents

Please list all dependent children in order of oldest to youngest, including college students.

Dependent Last Name	First Name	Name of school student plans to enter in the fall of 2019	Grade/Age in the Fall of 2019 Grade / Age	Annual tuition expense	Amount I/we plan to pay toward tuition	Notes
1.			/			
2.			/			
3.			/			
4.			/			
5.			/			

Please check if additional dependents are listed on a separate sheet.

F Taxable Income

The 2018 or 2017 federal tax return for student's household was:

- Filed
- Not filed
- Please enclose a signed copy of your Federal Income Tax Return

Actual 2018 or 2017

1. Total number of exemptions claimed on Federal Income Tax form: _____
2. Parent/Guardian A total taxable income from W-2 wages.
(list total income for Parent A only) \$ _____
3. Parent/Guardian B total taxable income from W-2 wages.
(list total income for Parent B only) \$ _____
4. Net business income from self-employed farm, rentals, and other businesses. (you must complete Section J) (attach Schedule C, E and/or F from your IRS 1040) \$ _____
5. Other non-work taxable income from interest, dividends, alimony, unemployment, and non-business income. \$ _____
6. Allowable "Adjustments to Income" as reported on your IRS 1040, 1040A, or 1040 EZ \$ _____
7. Total Adjusted Gross Income as reported on your IRS 1040, 1040A, or 1040 EZ \$ _____
8. Total Tax Paid as reported on your IRS 1040, 1040A, or 1040 EZ \$ _____
9. Medical/dental expenses as reported on Schedule A of your IRS 1040 form. \$ _____

G Non-Taxable Income

List the total amount received from 01/01/18 – 12/31/18 for all recipients in household.

Do Not list monthly amounts.

10. Child Support \$ _____ per year
11. Cash Assistance (TANF) \$ _____ per year
12. Food Stamps \$ _____ per year
13. Social Security income (SSI/SSD, etc.) \$ _____ per year
14. Student loans, and/or other grants received for Parent's education.
(not college attending dependents or students listed in Section E)
- a. total received in 2018 \$ _____ per year
- b. total used for household expenses \$ _____ per year
15. Housing assistance (Sec. 8, HUD, Parsonage, etc.) \$ _____ per year
16. Other non-taxable income (Workers' Comp., Disability, Pension/Retirement, etc. identify source(s) in Section L) \$ _____ per year
17. Loans/Gifts from friends or relatives \$ _____ per year
18. Personal Savings/Investment Accounts used for household expenses \$ _____ per year
19. Total non-taxable income for 2018 \$ _____ per year

You must provide 2018 YEAR-END documentation for items 11-16; either a Year-End Statement from the appropriate Public Agency or documentation showing totals from 01/01/18-12/31/18.

H Housing Information (Do not leave blank)

20. Do you rent or own your residence? Rent Own (go to line 22)
21. If renting, what is the monthly rental payment: \$ _____
- a. Amount paid by household \$ _____ per month
- b. Amount paid by other source(s) \$ _____ per month
22. If you own your residence:
- a. What is the current market value? \$ _____
- b. What is the amount still owed including home equity loans? \$ _____
- c. What is the monthly mortgage payment? \$ _____

I Assets & Investments (as of 12/31/18)

23. Total amount in cash, checking, and savings accounts \$ _____
24. Total value of money market funds, mutual funds, stocks, bonds, CDs, or other securities \$ _____
25. Total value of IRA, Keogh, 401K, SEP or other retirement accounts. \$ _____
26. If you own real estate other than your primary residence,
- a. What is the fair market value? \$ _____
- b. What is the amount still owned? \$ _____
27. Do you own a business? Yes No
If yes, please complete Section J.
- a. What is the fair market value of your business? \$ _____
- b. What is the amount still owed? \$ _____
28. Do you own a farm, ranch, or other property not included in 26? Yes No
If yes, please complete Section J.
- a. What is the fair market value of your property? \$ _____
- b. What is the amount still owed? \$ _____

M Miscellaneous Information

What school(s) are you intending to enroll in? Why? _____

If Catholic, what parish do you belong to? Please list parish involvement. _____

N Student Participation Criteria

**FOR STUDENTS PRESENTLY ATTENDING A CATHOLIC SCHOOL
TO BE COMPLETED BY CATHOLIC SCHOOL PRINCIPAL**

Child's Name		Current Grade Level	Current School	Satisfactory Disciplinary Standing Yes or No	Satisfactory Academic Standing Yes or No	Satisfactory Financial Standing Yes or No	Principal's Signature
Last	First						
1.							
2.							
3.							
4.							
5.							

O Certification, Authorization, and Documentation Checklist

**WHAT WE NEED TO PROCESS THIS APPLICATION
IF ANY OF THE FOLLOWING IS MISSING, YOUR APPLICATION WILL NOT BE PROCESSED**

1. This application form should be filled out in its entirety, signed and dated below by the parent or guardian listed in Sections A and B.
- 2.

<p>If you have filed a 2017 or 2018 IRS Form 1040</p> <p>A complete photocopy of your 2017 or 2018 Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S). 2017 or 2018 W-2 forms, 2017 or 2018 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s)</p>	<p>If you do not file an IRS Form 1040 and receive only non-taxable income:</p> <p>Photocopies of your 2018 YEAR-END Social Services statement (TANF, etc.), Food Stamp Documentation, Housing Assistance documentation, Student loans and/or grant documentation, Social Security income statement showing Total Amount received in 2018 for ALL members of the household.</p>
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I/we declare that the information on this form is true, correct, and complete to the best of our knowledge. I/we understand that some or all of the documents submitted will be subject to verification by Guardian Angel.

I understand that an admissions interview may be required at the school as which I am applying.

Sign Here _____
Parent/Guardian A _____ Date _____ Parent/Guardian B _____ Date _____

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A & B Parent, Guardian, or Older Adult

This form should be filled out by the parent, guardian or other adult responsible for the tuition of the child or children attending a Catholic school in the Archdiocese of San Antonio. If the parents/guardians are divorced or separated, only the parent responsible for the tuition and any other adult residing in the household should fill out the form. If tuition is shared, each responsible party must complete a Guardian Angel Application Form if financial aid is needed.

Answer all questions for both parent(s), stepparent(s), or guardian(s) responsible for tuition for the dependent(s) listed in Section D. **Do not leave any questions blank.** If natural parents are divorced, separated or single answer all questions in Section C. If natural parents are divorced/separated and remarried, list information for custodial parent and new spouse. If either parent answers "self-employed," complete Section J.

CALCULATIONS ARE BASED ON TOTAL HOUSEHOLD INCOME.

C Household Information

ITEM 1: Enter total number of individuals living in household. Include any college students claimed on the tax return. Do not include children who have moved out of the home. Include all family members dependent on and residing with parent listed in Section A.

ITEM 2: Check the appropriate box indicating custodial parents' marital status. If parents are divorced, separated or single, complete Section C.

D Divorced or Separated Parents

If dependent(s) parents are divorced or separated, or do not reside in the same household, the custodial parent must provide the information requested in Section C about the non-custodial parent.

If the date of separation took place in the year 2018 or 2017 (depending on which tax returns you are using), we still require copies of any tax returns filed jointly or independently by both parent(s)/guardian(s) for 2018 or 2017.

ITEM 5: List the total amount of child support actually received by custodial parents listed in Sections A & B. If total received differs from court ordered amount, list only the total received.

ITEM 8: Indicate who is responsible for tuition and what percentage for the dependents listed in Section E.

E Dependents

List all dependent children residing in your household in order of oldest to youngest, if your dependents will be enrolled in any tuition charging school or agency next fall (including daycare, preschool, elementary school, high school, college, or trade school), list the name of the school. List the grade your child (ren) will enter next fall (2019-2020), the age of the student, the amount you plan on paying toward each child's tuition during this year, and the amount of tuition charged per student.

NOTE: The information regarding tuition charged per student assists Guardian Angel Evaluation Committee in making the most equitable analysis of your ability to pay for Catholic school education. If you are unsure, please estimate.

F Taxable Income

List all actual amounts for 2018 or 2017 (whichever tax return you are using)

- ITEM 1:** Enter the total number of exemptions you claimed (or will claim) on your 2018/2017 IRS Form 1040, 1040A or 1040 EZ.
- ITEM 2:** Enter the total 2018/2017 taxable income earned in wages, salaries and tips for parent/guardian/other listed in SECTION A. Attach all copies of 2018/2017 W-2 forms and/or 2018/2017 1099 forms from all employers.
- ITEM 3:** Enter the total 2018/2017 taxable income earned wages salaries and tips for parent/guardian/ other listed in SECTION B. Attach all copies of 2018/2017 W-2 forms and/or 2018/2017 1099 forms from all employers. **(Please make sure all documentation is copied on regular 8 ½ x 11 paper)**
- ITEM 4:** Enter the total net income from business (attach Schedule C or C-EZ), all rents, royalties, partnerships, S-corporations, estates, trusts, etc. (attach Schedule E, Schedule K-1 and applicable Form 1065 and/or 1120S), and all farm income or loss (attach Schedule F). If you have received income from any of these sources, you must also fill out Section K of this application. (See 2015 1040 lines 12, 17 and 18, enter sum total.)
- ITEM 5:** Enter the total of all other taxable income from interest, dividend incomes (attach Schedule B if over \$400), taxable refunds, credits or offsets of state and local income taxes, alimony received, capital gain or loss (attach Schedule D). List all capital gain distributions not previously reported, total IRA distributions (if rolled over, explain in Section L), pensions and annuities, unemployment compensation, taxable social security benefits, and any other taxable income. **Attach copies of all Form 1099/1099F, and/or form 1098 for Interest/Dividends, Pensions/Annuities or other misc. income. Attach copies of Social Security Income statements and Unemployment compensation documentation for year-end 2018/2017.**
- ITEM 6:** Enter allowable adjustments to income, such as IRA payments, self employment tax, self-employed health insurance deduction, Keogh retirement plan and self-employed SEP deductions, penalty on early savings withdrawals, and alimony paid. Add together to arrive at your total adjustments. DO NOT include your standard deduction or deduction amounts for each family member.
- ITEM 7:** Enter total adjusted gross income as reported on your IRS Form 1040, 1040A, or 1040EZ. Attach all pages of the applicable tax form (1040, 1040A, 1040EZ) for documentation.
- ITEM 8:** Enter the Total Tax paid (not withheld) as reported on your IRS Form 1040, 1040A, or 1040EZ.
- ITEM 9:** Enter the total of any medical and dental expenses reported on Schedule A of your IRS Form 1040 (attach Schedule A).

G Non-Taxable Income

If you receive non-taxable income, **you must list and provide documentation of the TOTAL YEARLY AMOUNTS received in 2018** for all the recipients in the household for the following: Cash Assistance (TANF), Food Stamps, Social Security income, Student loans and/or grants (received for PARENT'S education), Housing assistance (Section 8, HUD, etc.), Worker's Compensation, Disability or Retirement.

- ITEM 10: Child support:** Report total amount received for 2018 for all children in the household.
- ITEM 11: Cash Assistance (TANF):** Report total amount received for 2018.
- ITEM 12: Food Stamps:** Report total amount received for 2018. Do not combine with TANF.
- ITEM 13: Social Security benefits:** Report the total non-taxable amount received in 2018 for all recipients in the household.
- ITEM 14: Student loans and/or grant:** Report the total amount received in 2018 for **PARENT's** education. Do not list loans, grants or scholarships received for dependents in Section E. Identify how much of this income was used for household expenses in 2018.

ITEM 15: Housing assistance: Report the total amount received for 2018. Identify in Section L all sources of Housing assistance (parsonage, government assistance, Section 8, HUD, family/friends or other sources) including monies received toward rental/mortgage payments and/or utilities.

ITEM 16: Other non-taxable income: Report all additional non-taxable income received in 2018 including: Deductible IRA or Keogh payments; untaxed portions of pensions; tax exempt interest income; foreign income exclusion; Workers' Compensation; veterans non-education benefits (Death Pension, Dependency and Indemnity Compensation, etc.); food and other living allowances paid to members of the military, clergy or others; cash support or any money paid on your behalf, including support from a non-custodial parent or any other person (do not include court ordered support here); or any other untaxed benefit or income not subject to taxation by any government (Refugee Assistance, VA Educational Work-Study, etc.). Identify source(s) in Section L.

ITEM 17: Loan/Gifts received from friends or relatives: Report the total amount received in 2018.

ITEM 18: Personal Savings/Investment Accounts: Report the total amount used in 2018 for household expenses.

ITEM 19: Total non-taxable income for 2018: Add together items 10-18.

H Housing Information

ITEM 20 & 21: If you rent your home or apartment, list your monthly rental or lease payment here, including amounts paid by household and other sources.

ITEM 22a: Determine the present value of the family home and list it. Local real estate agents should be able to help you if you are unsure.

ITEM 22b: Check with your lending institution and enter the amount still owed, including second mortgages.

I Assets and Investments

ITEM 23: List total of current balances in cash, savings, and checking accounts. Do not include IRAs or Keoghs.

ITEM 24: List total current market value of money market funds, mutual funds, stocks, bonds, CDs or other securities.

ITEM 25: List total current market value of all retirement funds, including IRA, Keogh, 401K, and SEP plans or other retirement accounts.

ITEM 26: Answer Items 26a and 26b for any and all investment real estate (not including the family's primary residence), if applicable. Second homes, rental properties, and land contracts should be included.

ITEM 27: If you own a business, check the Yes box and answer Items 27a and 27b. In addition, complete Section K of this application.

ITEM 28: If you own a farm, check the Yes box and answer Items 28a and 28b. In addition, complete Section K of this application.

J Business Income

Provide 2017 Business Income Estimates if you have not filed your 2018 Tax Return.

ITEM 29: List total GROSS business taxable income for 2018.

ITEM 30: List total NET business taxable income/loss for 2018.

ITEM 31: List the total amount paid by business in 2018 for home rent or mortgage.

ITEM 32: List the total amount paid by business in 2018 for personal automobile.

ITEM 33: List the total amount of personal expenses paid by business in 2018 that do not fall into one of the categories above.

ITEM 34: List total amount of rental income received in 2018.

If providing income estimates for more than one business, corporation or farm (Schedule C, Schedule E, and/or Schedule F) please list information for each business, corporation or farm separately. Use additional sheet of Section L, if necessary.

K Unusual Circumstances

Check any and all items that apply to your situation. If your circumstances require explanation beyond the scope of this application, please use Section L.

L Explanation

If any specific question requires clarification, write a brief explanation in this space.

M Miscellaneous Information

Please list which school(s) you are planning on sending your child (ren). If you are uncertain, write uncertain.

List parish in which you are registered. Include involvement such as: Lector, Scout Leader, CYO coach, Grounds Clean-Up Committee, ACTS, etc.

N Student Participation Criteria

This section is for families that have students presently enrolled in one or more of our Catholic schools. This section must be completed by the principal of the school that your child is presently enrolled.

O Certification, Authorization, and Documentation Checklist

You **must** sign the form in this section. By signing the form, you certify that the information submitted is correct. This application **CANNOT** be processed without the appropriate signature(s) and the appropriate documentation.

REQUIRED DOCUMENTATION

You must submit photocopies of all pages of your 2018 or 2017 Federal Tax Return Form 1040, 1040A, or 1040EZ (as filed with the IRS, with all Schedules, including applicable Schedule K-1, Forms 1065 and/or 1120S), 2017 or 2016 W-2 forms, 2017 or 2016 1099/1099R, or 1098 Forms for any wage-earning adult residing with the applicant(s). Do not include your State tax return unless requested.

IF YOU RECEIVE NON-TAXABLE INCOME

You must submit photocopies of your 2018 YEAR-END (01/01/18-12/31/18) Cash Assistance documentation (TANF, etc.), Food Stamp documentation, Housing Assistance documentation, Student loan and/or grant documentation (for PARENT's education), Social Security Income statement, showing the **TOTAL AMOUNT** received in 2018 for **ALL** members of the household.

Avoiding the MOST Common Error

THE MOST COMMON ERROR THAT APPLICANTS MAKE IS SENDING THE APPLICATION INCOMPLETE. IN ORDER FOR AN APPLICATION TO BE REVIEWED, IT MUST INCLUDE:

- All pages of your 2018 or 2017 IRS Form 1040, 1040A, or 1040EZ (federal income tax return).

Do not send your state tax return, recap or tax summary.

(If you have not yet filed your 2018 IRS Form 1040, or you do not file, please see the Required Documentation section of the instructions.)

- 2018 or 2017 W-2 and/or 1099 forms for individual(s) listed in Sections A and B. **(Please make sure all documentation is copied on regular 8 ½ x 11 paper)**
 - Non-taxable income verification.
 - Print clearly and neatly with a black or dark ball point pen.
 - **Make a photocopy of your completed Guardian Angel Application Form for your records.**
 - Do not staple ANYTHING to the Guardian Angel Application Form.
 - Submit the original application only.
 - Affix proper postage to the envelope (applications without sufficient postage will be returned by the post office).
 - Do not send any original documents. Originals will not be returned.

Guardian Angel Evaluation Committee CANNOT PROCESS YOUR APPLICATION IF YOU HAVE NOT INCLUDED THE REQUIRED DOCUMENTATION.

Other Common Errors

SECTIONS A & B

List the parent, guardian or other adult responsible for tuition and any other adult residing in the household. Complete each section in its entirety, including age, social security number, and name of employer. If you are self-employed, check the box and complete Section J.

SECTION C

This section should include the total number of parents, children and other individuals residing in the household. Any household member listed as "Other" should be identified, using Section L if necessary for explanation.

SECTION D

This section should be completed by the custodial parent with information about the non-custodial parent.

SECTION E

List all dependent children, including college students, in order of oldest to youngest. If any dependents will attend a tuition charging school next fall, fill in all columns for those children.

SECTION F

Answer Items 1-9 for 2018 or 2017. YOU MUST include documentation of all income received by both parents/guardians residing with the applicant(s). If you are divorced or separated and receive child support, list the yearly amount in Section G Item 10.

SECTION G

List the **YEARLY** amounts received for Items 10-19. Remember, do not list monthly amounts.

SECTION H

If you rent your home, list your monthly rental payment, including any payments made by sources other than the household. If you own your home, answer items 22a, b, and c.

SECTION I

Enter totals for Items 23, 24, and 25 based on your investment, savings, and/or checking statements. If you own rental or investment property, answer Items 26a and 26b. You must include Schedule E from your IRS Form 1040.

If you answered "Yes" to Item 27 or 28, complete Section J of the application. You must include Schedule C, E, and/or Schedule F from your IRS Form 1040.

SECTION J

Answer each question that pertains to your business income.

SECTION K

Check boxes for any unusual or relevant circumstances which affect the applicant. If you feel that your circumstances require explanation beyond the scope of this application, please notify the school to which you are applying. Do not include a letter of explanation with this application.

SECTION L

If you feel that any specific question requires clarification and/or an explanation, write a brief summary in the space provided.

SECTION M

List the school(s) that you plan on enrolling your child(ren). If you are uncertain of the school(s), please leave blank.

Complete only if you are a Catholic. List the parish that you are registered and attend. List your involvement in the parish.

SECTION N

This section is ONLY for students presently enrolled in a Catholic school. This section must be completed by the principal of the Catholic school your child is presently attending. The principal's signature must be next to the evaluation.

SECTION O

Confirm that you have attached ALL REQUIRED DOCUMENTATION and that you have signed the application.

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