



Office Use only:
TA Application Fee Paid/Date: _____

122 Regent Street, Saratoga Springs, NY 12866—Phone: 518.587.8827 Fax: 518.581.1682

Tuition Assistance Application (TA) 2010-2011

Please fill out this form **completely** and return it with **\$25 by April 1, 2010** to the TA Committee box at 122 Regent Street. Attach on a separate sheet of paper any information necessary to give the TA Committee a more complete and accurate picture of your financial life. **Please also attach a complete copy of your Federal 2009 Income Tax Return.**

Parent or Guardian

Name		Age
Home Address		Phone
City, State, Zip		
Occupation	Title	
Employed by		Yrs on Job
City	Phone	
If self-employed, describe what you do		

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If self-employed, describe what you do		

Please complete if: <input type="checkbox"/> Divorced <input type="checkbox"/> Legally separated <input type="checkbox"/> Separated, no court action <input type="checkbox"/> Never married Date of Divorce or Separation: _____	Noncustodial Parent's Full Name	
	Home Address/PO Box, City, State, Zip	
	Occupation	Title
	Employed by	City, State
Name of parent who claimed student as a tax exemption for previous year:		
Is there an agreement specifying a contribution from the non-custodial parent for educational expenses? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, please specify:		

Students attending the Waldorf School of Saratoga Springs 2010-2011

Tuition: 2-Year-Old \$1800 3-Day: \$3430 4-Day: \$4375 Rose Kindergarten: \$5720 Forest Kindergarten: \$6965
 Grades 1-8: \$11,150 Grades 9-12: \$13,300

First and Last Name	Grade	Full Tuition Cost (without sibling discount)

Office Use:

Total Tuition: \$ _____

TA Approved \$ _____

Amount of TA Requested: \$ _____

Supplemental Income and Benefits Worksheet—Please enter totals on page 6

Please provide detailed information. Attach explanations and additional information as necessary. **This page must be filled out.** Write N/A for items that do not apply to you. **Do not leave any items blank.**

Income (as of January 2010)

SUPPLEMENTAL/OTHER INCOME	Actual 2009	Estimated 2010	Name(s) of Persons
Cash income (tips, etc) (kept confidential)			
Regular gifts, grants or trust funds - from family or other sources. Please explain.			
Child support			
Investment income			
Rental income			
Veterans benefits			
Food stamps, SSI, WIC, welfare			
Disability			
Assistance from family			
Business profit			
Other income (attach explanation)*			
TOTAL SUPPLEMENTAL/OTHER INCOME:	2009	2010	

Employment Benefits

Please detail employment benefits and their monetary value for 2010 (estimate if necessary) for each employed person.		
Utilities:		
Travel:		
Provided housing (fair market value):		
Provided auto:		
Life Insurance:		
Medical Insurance:	Dental:	Eye:
Pension Plan (please describe):		
Other:		

Asset Worksheet

Please provide detailed information. Attach explanations and additional information as necessary. **This page must be filled out.** Write N/A for items that do not apply to you. **Do not leave any items blank.**

Assets (as of January 2010)

Home Owners		Other Real Estate
Year Home Purchased: _____	Have you refinanced (second mortgage or equity loan) your home? <input type="checkbox"/> Yes <input type="checkbox"/> No	Year purchased _____
Purchase Price: \$ _____		Description: _____
Total fire insurance carried: \$ _____	Year of equity loan _____	Purchase Price: \$ _____
Present market value: \$ _____	Amount of loan \$ _____	Total fire insurance carried \$ _____
Principal due on mortgage: \$ _____	Annual payments on second mortgage/equity loan \$ _____	Present market value \$ _____
Total annual payments on all mortgages and equity loans: \$ _____		Total annual mortgage payments \$ _____

Vehicles (including cars, trucks, boats and recreational vehicles)

Make and Year	Make and Year
Make and Year	Make and Year

I/we share ownership of a business: Yes No
If yes, please describe:

Securities / Mutual Funds / Trust Funds/IRA/Keogh/401(k)	Shares	Value per share	Total Value
Savings Accounts			
Other Assets including art and antiques of known value: please explain, attaching additional sheets as necessary			
Total Other Assets			

Expense Worksheet 1—Please enter totals on page 6

Please detail specific expense categories and include dollar amounts for calendar year 2009 (estimate where necessary).

Taxes	Insurance	Health	Utilities	Vehicles	Childcare
Federal	Life	Out-of-Pocket	Gas	Gasoline	Daycare
State	Auto	Physicians	Oil	Maintenance	Special Care
Property	Health	Hospital	Wood/coal	Registration	Camp
Other	Dental	Other	Phone	Other	Other
	Other		Other		
Total	Total	Total	Total	Total	Total
Personal Care	Entertainment	Vacation	Mortgage / Rent	Home Care	Charitable Gifts
Clothing	Cable	Lodging		Repairs	
	Movies / Plays	Travel		Maintenance	
Supplies	Concerts	Expenses		Improvements	Hours Volunteered at WSSS per year
	Sports	Meals		Supplies	
Other	Meals	Other		Other	
Total	Total	Total	Total	Total	Total
Tuition Expense	Other Educational Expenses	Food	Animal Care	Loan and Credit Card Yearly Payments	Other
	Tutoring		Pets	Credit Cards	Pension Plans
	Music Lessons			Student Loans	Other
	Other		Livestock	Vehicle Loans	
				Other	
Total	Total	Total	Total	Total	Total

Name(s) of any other person(s) in the household	Age	Relationship

Provide current year (2009-2010) information below for all dependent children or adults who have tuition .								
First Name	Name of school or college	Grade or year in college	Dollar amounts for 2009-2010					
			Total cost of 1 year	Amount paid by you	By financial aid award	By loan	By Job (include summer earnings)	By other sources (explain below)
Total								

Provide next year (2010-2011) information below for all dependent children or adults who have tuition .								
First Name	Name of school or college	Grade or year in college	Dollar amounts for 2010-2011					
			Total cost of 1 year	Amount paid by you	By financial aid award	By loan	By Job (include summer earnings)	By other sources (explain below)
Total								

Please explain about "other sources." If you need more space, please attach a separate sheet.

Are there any special considerations or unusual expenses we should know about?

Is there any way in which you can contribute to the school other than financial?

The undersigned understand and agree that accounts granted Tuition Assistance in arrears over 60 days that have not made payment arrangements with the finance office can and may have the Tuition Assistance reversed. Accounts will then be responsible to pay the balance of tuition in full.

The undersigned also understands the information contained herein is for the confidential use of the Waldorf School of Saratoga Springs only. I/We declare that the information on this form, to the best of my/our knowledge and belief, is true, correct and complete.

Signature of parent or guardian

Signature of parent or guardian

Printed Name

Printed Name

Date

Date

The Waldorf School of Saratoga Springs does not discriminate on the basis of race, color, national or ethnic origin in the administration of its educational policies or tuition assistance programs.



WSSS Policy on Tuition Assistance

Behind every student at the Waldorf School of Saratoga Springs stand parents, relatives or friends who are paying for the opportunity of a Waldorf education. Some parents pay the full cost of each child, and some receive financial aid from the school in the form of tuition assistance. Each family, regardless of its financial situation, is an important part of the school.

TA at the Waldorf School of Saratoga Springs does not exceed 50% of the tuition bill. All families with multiple children in the school receive some tuition assistance in the form of a sibling discount.

Families who feel unable to pay full tuition are invited to submit a tuition assistance application. These are evaluated by a committee of individuals from the school community who follow guidelines that allow for consistency and fairness. The committee seeks an affordable tuition for any family willing to make the sacrifice all parents must make to provide their children a Waldorf education. When evaluating an application, the committee considers the following:

- What is the gross annual income of the family?
- What are the family assets?
- What is the amount and nature of the family expenses?
- Is the WSSS being asked indirectly to support home improvements or other family life-style choices?
- Is there a special need this school year?
- Is the family reevaluating its need each year, as both income and tuition change?
- Is the family placing the value of a Waldorf education high on its list of financial priorities?

Procedure

Submit the completed application with a complete copy of your federal tax return information, including schedules A-D. Submit application with **\$25.00 by April 1st**. Ideally the application as of April 1st will be complete. **If necessary a family may submit the TA application on April 1st with tax information given on April 15th.*** There is a limited amount of TA available so it is very important that applications are received by this date.

Please be sure your application is complete; applicants will be notified by email or phone if your information is incomplete. Incomplete packages will not be evaluated.

- TA Committee processes applications in accordance with its Procedures and Guidelines.
- After determination is made a letter is sent with decision to applicant.
- Any request for appeal of the determination shall be made, **in writing**, within 2 weeks of the award, outlining the basis of appeal and relief sought.
- COMPOSITION OF COMMITTEE - The TA Committee includes at least 3 members, who are changed regularly. The TA Committee reports to the Finance Committee. The Treasurer of the Board of Directors shall be available to assist work of the TA Committee as deemed necessary.

Please complete the two worksheets (income and expenses) first, and use these to complete the rest of the application. All pages must be completed and returned: 122 Regent Street, Saratoga Springs, NY 12866

***TA applications submitted *or* completed after April 15th will automatically be reduced by at least 10%.**

***TA applications submitted *or* completed after June 1st will be capped at 25%.**