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 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, 2021, even if no longer at this job

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

1. Employer Name
2. 2021 Wages, Tips, Other Compensation
3. 2022 Estimated Wages, Tips, Other Compensation

**SECTION 4** List Business, Farm, Corporation, Partnership, Trust and Miscellaneous Income since January 1, 2021

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. 2021 Actual Net Profit on this application.

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

- Miscellaneous Income - Form 1099: Line 7, 2. Leave blank
- Business Schedule C: Line 31, 2. Line 13
- Business Schedule C-EZ: Line 3, 2. Leave blank
- Farm - Schedule F: Line 34, 2. Line 14
- Estates and Trusts - Form 1041: Line 22, 2. Leave blank
- Partnership - Form 1065: Line 22, 2. Line 16c

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

- 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

**SECTION 5** Other Monthly Income

1. Welfare Income
2. Food Stamps
3. Parent(s)/Guardian(s)
4. Dependents under 19
5. Elderly Dependents
6. Child Support
7. Alimony
8. Taxable
9. Non-Taxable

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**SECTION 6 Other Yearly Income**

<table>
<thead>
<tr>
<th>1. 2021 Interest &amp; Dividends</th>
<th>Yearly Unemployment</th>
<th>Miscellaneous Yearly Income</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yearly Interest &amp; Dividends</strong></td>
<td><strong>4. Actual 2021</strong></td>
<td><strong>6. 2021 Lump Sum</strong></td>
</tr>
<tr>
<td><strong>Yearly Workers’ Compensation</strong></td>
<td><strong>5. Estimated 2022</strong></td>
<td><strong>7. Recurring Yearly</strong></td>
</tr>
<tr>
<td><strong>2. Actual 2021</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>3. Estimated 2022</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. & 7. Include any income that is not accounted for elsewhere on this application.

**SECTION 7 If You Pay Rent**

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

<table>
<thead>
<tr>
<th>1. Monthly Rent</th>
<th><strong>SECTION 8 Yearly Energy Expenses (renters and homeowners)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yearly Renters’ Insurance</strong></td>
<td>If you rent, do not include these expenses if they are already included in monthly rental payments. Homeowners should report expenses.</td>
</tr>
<tr>
<td><strong>2. Yearly Renters’ Insurance</strong></td>
<td>1. <strong>Electricity</strong></td>
</tr>
<tr>
<td></td>
<td>2. <strong>Gas, Oil, Coal</strong></td>
</tr>
<tr>
<td></td>
<td>3. <strong>Water, Sewage</strong></td>
</tr>
</tbody>
</table>

**SECTION 9 Assets and Expenses – Home**

Fill out this section if you are a homeowner.

<table>
<thead>
<tr>
<th>1. Year of Purchase</th>
<th><strong>SECTION 10 Assets and Expenses – Real Estate other than Home</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4. Current Market Value:</strong> If you have not had a recent appraisal on your property, use the most recent Real Estate Tax Assessment.</td>
<td></td>
</tr>
<tr>
<td><strong>5. Amount Owed on Home Loans &amp; Mortgages</strong></td>
<td>1. <strong>Number of Properties</strong></td>
</tr>
<tr>
<td><strong>2. Purchase Price</strong></td>
<td>2. <strong>Purchase Price of all Properties</strong></td>
</tr>
<tr>
<td><strong>3. Improvements/Additions</strong></td>
<td>3. <strong>Total Monthly Loan/Mortgage Payment</strong></td>
</tr>
<tr>
<td></td>
<td><strong>8. 2021 Home Insurance</strong></td>
</tr>
<tr>
<td></td>
<td><strong>10. 2021 Rental Income</strong> (if not a single family dwelling)</td>
</tr>
<tr>
<td></td>
<td><strong>11. 2021 Rental Expenses</strong> (if not a single family dwelling)</td>
</tr>
</tbody>
</table>

**SECTION 11 Assets and Debt – Automobiles**

Please enter market value and current debt for the vehicles that you own in items 1., 2., and 3., and requested information for the vehicles that you are leasing in 4. and 5.

<table>
<thead>
<tr>
<th>Information for vehicles that you own</th>
<th>Information for vehicles that you lease</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. # of Vehicles</td>
<td>6. <strong>Yearly Insurance Cost for All Vehicles</strong></td>
</tr>
<tr>
<td>2. Total Current Market Value</td>
<td>4. # of Vehicles</td>
</tr>
<tr>
<td>3. Total Debt</td>
<td>5. Total Monthly Lease</td>
</tr>
</tbody>
</table>

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**SECTION 12 Assets – Recreational Vehicles/Boats**

1. 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.
2. Debt: Please list amount you owe for all of the recreational vehicles that you own.

**SECTION 13 Assets – Cash, Stocks, etc.**

1. Checking, Savings, Cash, CD’s: List current value of these accounts, along with cash on hand.
2. Stocks, Securities, Bonds, Mutual Funds: List current value of these accounts.

**SECTION 14 Assets – Retirement Plans**

1. Total Current Value
   - Self Managed (IRA, SEP, etc.):
   - Other Managed (401k, etc.):
2. 2021 Contribution – Employer
   - Self Managed (IRA, SEP, etc.):
   - Other Managed (401k, etc.):
3. 2021 Contribution – Household
   - Self Managed (IRA, SEP, etc.):
   - Other Managed (401k, etc.):

**SECTION 15 Medical Expenses**

1. Medical/Dental and Prescription Drugs: List only out-of-pocket expenses that will not be, or have not been covered by insurance. Include co-pay amounts here.
2. Annual Insurance Premiums: If you pay insurance premiums, list the corresponding amounts here. Please list the total amount you pay in a year.

**SECTION 16 Alimony and Child Support Expenses**

2. Estimated Child Support to be paid to Others (2022)
3. Alimony Paid to Others (2021)
4. Estimated Alimony to be paid to Others (2022)

**SECTION 17 Day Care and/or Elderly Care Expenses (include summer camp expenses)**

Do not include pre-kindergarten, as this is considered a school expense which should be listed in Section 22.

1. Dependent Name
2. 20201 Payments
3. Estimated 2022 Payments

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

If you made tax deductible donations to non-profit organizations in 2021, list the three organizations you donated the most to and the amount of those donations.

1. Charity Name
2. 2021 Contributions

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

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.

5. Education – Dependents: List the total amount of education debt owed for dependents. Do not include dependents’ tuition amount for the 2022-23 school year.

7. Other Debt: List the amount of debt excluding all other debt previously listed.

SECTION 21 Contributions to Education (2022–2023)

1. How much (in your opinion) can Parent(s)/Guardian(s) contribute toward the tuition of all dependents in this household next year?

2. How much per year is a non-custodial parent ordered by law to contribute toward the education of those applying for financial aid with this form?

3. How much will any other sources contribute toward the education of those applying for financial aid with this form?

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

If you have more than five dependents, please see 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 underage 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.

1. Dependent Earnings in 2021: If a dependent held a job in 2021, list the earnings in this section. Do not list Social Security income or earnings from stocks, securities, etc.

<table>
<thead>
<tr>
<th>Dependent Number</th>
<th>1. Dependent Earnings in 2021</th>
<th>2. Dependent Current Savings</th>
<th>3. 529 Savings Plan</th>
<th>4. Dependent Current Savings: Do not include 529 College Savings Plans in this figure.</th>
<th>5. Amount Dependent can contribute to education from earnings/savings for school year 2022-23</th>
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<tbody>
<tr>
<td>#1</td>
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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.

Contact TADS

**E-mail, Telephone or Fax:**
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.

**Fax Number:** 612.548.3326