

TADS Financial Aid Application Worksheet - *2027-2028 School Year*

This is a worksheet to help you prepare to fill out the TADS Financial Aid Application and WILL NOT be accepted as an application. ALL financial aid applications must be submitted online at secure.tads.com.

You will need the following supporting documentation before you begin:

- Most recently filed federal tax return (2025 or 2026)
- Most recent W-2 statement(s) received by all Parent/Guardian(s) listed on the application (2025 or 2026)
- Recent paystubs of any jobs currently held by all Parent/Guardian(s) listed on the application
- Most recent Self-Employment Documentation for Parent/Guardian(s) who are self-employed. This may include:
 - Most recent Schedule C or 1099 forms for self-employed persons (2025 or 2026)
 - Most recent Schedule E and K1 forms for all business owners or shareholders
 - Most recent 1120-S or 1120 Corporation Tax Returns or 1065 Partnership Tax Returns filed by the business for individuals who own 20% or more of a business
- All documentation of any monthly or yearly income received outside of W2 or business/self-employment income (i.e. welfare/cash benefits, food stamps, unemployment, workers' compensation)
- Other documentation (mortgage statement, recent utility bills, etc) may be required

Sections 1 and 2: List All Parent(s)/Guardians Living in the Household.

- We will need your first and last name, birth date, and your daytime phone number (mobile or best number at which to reach you advised).
- Select your relationship to dependents in the household (one or more), and your work status. To add another parent to the application, click on "Add Additional Parent/Guardian"
- Please note, all parent/guardian(s) must reside in the household. If parent/guardian(s) do not live in the same household, separate applications should be completed to account for each individual household situation.
- Finally select each parent/guardian(s) employment status.
 - If a parent/guardian indicates that they are employed, they will need to list at least 1 W2 job in section 3.
 - If a parent/guardian indicates that they are self-employed, they will need to list at least 1 business in section 4.

Section 3: List All Jobs Held by Parent(s)/Guardian(s) Since Jan 1, 2026, Even if No Longer Employed.

If a Parent/Guardian is self-employed or has contractor work, enter that information in Section 4.

Wages, Tips, Other Compensation: This value can be found in Box 1 of your 2026 W-2. If you do not have your 2026 W-2 yet, use the year-to-date total off your last December 2026 paycheck.

Employer 1 Name: _____

- Parent(s)/Guardian(s) Employed with Employer 1: _____
- 2026 Wages/Tips/Other Compensation: _____
- 2027 Estimated Wages/Tips/Other Compensation: _____

Employer 2 Name: _____

- Parent(s)/Guardian(s) Employed with Employer 2: _____
- 2026 Wages/Tips/Other Compensation: _____
- 2027 Estimated Wages/Tips/Other Compensation: _____

Section 4: List Business/Self-Employment, Farm, Corporation, Partnership, Trust, and Miscellaneous Income since January 1, 2026

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 items listed, Net Profit and Depreciation. Listed after each item is the action you need to take for that item. Continuing with the partnership example, you would look at "Net Profit" and notice that it says "Line 22". Find Line 22 on the Partnership Form 1065 and enter that number into 2026 Actual Net Profit on the application.

Miscellaneous Income - Form 1099: Net Profit: Line 7, Depreciation: List as 0
Business Schedule C: Net Profit: Line 31, Depreciation: Line 13

Farm - Schedule F: Net Profit: Line 34, **Depreciation:** Line 14
Estates and Trusts - Form 1041: Net Profit: Line 22, **Depreciation:** List as 0
Partnership - Form 1065: 1 Net Profit: Line 22, **Depreciation** Line 16c
Corporation (Short Form) - Form 1120-A: Net Profit: Line 26, **Depreciation:** Line 20c
Corporation - Form 1120: Net Profit: Line 30, **Depreciation:** Line 20
S Corporation - Form 1120S: Net Profit: Line 21, **Depreciation:** Line 14c

Business 1 Name: _____

- Currently Operating (Yes/No): _____
- Type of Business (Choose 1): Proprietorship (Self Employment/Contract), Partnership, Corporation, Farm)
- 2026 Estimated Net Profit: _____
- 2026 Depreciation from Business: _____
- 2027 Estimated Net Profit: _____

Business 2 Name: _____

- Currently Operating (Yes/No): _____
- Type of Business (Choose 1): Proprietorship (Self Employment/Contract), Partnership, Corporation, Farm)
- 2026 Estimated Net Profit: _____
- 2026 Depreciation from Business: _____
- 2027 Estimated Net Profit: _____

Section 5: List Any Other Monthly Income Received (that has not already been listed in sections 3 and 4)

Report any other income such as Monthly Welfare Income, Social Security, Child Support etc.

If any section does not apply to you, please list "0" (zero) for that value.

- Monthly Welfare (Cash Benefit) Income _____
- Monthly Food Stamp/SNAP Income _____
- Monthly Social Security Income (Received for Parent/Guardian(s)) _____
- Monthly Social Security Income (Received for Child(ren) living in the household) _____
- Monthly Social Security Income (Received for Grandparent(s) living in the household) _____
- Monthly Child Support Income Received (average) _____
- Monthly Alimony Income Received (average) _____
- Other Monthly Taxable Income Not Already Listed _____
- Other Monthly Non-Taxable Income Not Already Listed _____

Section 6: List Any Other Yearly Income Received (that has not already been listed in sections 3, 4 or 5)

Report any other income received yearly such as interest/dividends, unemployment, etc

If any section does not apply to you, please list "0" (zero) for that value.

- Interest/Dividend Income (this value is found by taking the sum of lines 2a, 3a and 3b on your most recent 1040 tax return) _____
- Workers Compensation (2026) _____
- Workers Compensation (2027 Estimated) _____
- Unemployment Income (2026) _____
- Unemployment Income (2027 Estimated) _____
- Other Yearly Taxable Income Not Already Listed _____
- Other Yearly Non-Taxable Income Not Already Listed _____

Section 7: Rent Payments (if applicable)

If you pay rent, enter the amount you pay for rent alone. Do not include any utilities expenses unless they are built into your monthly rent payments. Utilities will be asked separately in section 8.

- Monthly Rent _____
- Yearly Renter's Insurance _____

Section 8: Utilities Expenses (If not included in your mortgage or rent payment)

Both renters and homeowners should list utilities expenses in this section. Do not include any utilities expenses that are built into your monthly rent or mortgage payments.

- Gas/Oil Coal Annual Expenses (monthly amount x 12) _____
- Electricity Annual Expenses (monthly amount x 12) _____
- Water/Sewage Annual Expenses (monthly amount x 12) _____

Section 9: Mortgage Information for your Primary Home (if applicable)

If you own your primary home, please complete this section.

- Year of Purchase: _____
- Purchase Price: _____
- Cost of Improvements/Additions: _____
- Current Market Value of Home: _____
- Amount Owed on Home Loans + Home Equity (sum): _____
- Monthly Mortgage Payment _____
- 2026 Property Tax Amount (if not included in your monthly mortgage payment):

- 2026 Rental Income (Yearly- if part of primary home is rented out):

- 2026 Rental Expenses (Yearly- if part of primary home is rented out):

Section 10: Mortgage Information for Real Estate other than Primary Home (if applicable)

If you own any real estate outside of your primary home, please complete this section.

- Number of Properties Owned: _____
- Combined Purchase Price of all Properties Owned: _____
- Combined Cost of Improvements/Additions: _____
- Combined Current Market Value of all Properties Owned: _____
- Combined Monthly Mortgage Payment of all Properties: _____
- Combined Amount Owed on Home Loans + Home Equity (sum):

- Combined 2026 Rental Income (Yearly- if part of primary home is rented out):

- Combined 2026 Rental Expenses (Yearly- if part of primary home is rented out):

Section 11: Vehicle Information

This section asks for information on vehicles that you own or lease.

- Do you own or lease any vehicles? (Yes or No): _____
- Number of Vehicles Owned: _____
- Total Market Value of All Vehicles Owned: _____
- Total Amount Owed on All Vehicles: _____
- Total Monthly Lease: _____
- Yearly Insurance Cost for All Vehicles (Leased or Owned): _____

Section 12: Assets- Recreational Vehicles/Boats

This section asks for the combined current market value of all recreational vehicles owned by your household. A few examples of recreational vehicles are motor homes, boats, motorcycles, all terrain vehicles, personal watercraft, dune buggies and snow mobiles. Please also list the combined amount owed on any recreational vehicles owned.

- Combined Recreational Vehicle(s)/Boat(s) Value: _____
- Combined Recreational Vehicle(s)/Boat(s) Debt: _____

Section 13: Assets- Cash, Savings, Stocks, Etc

This section asks you to list the current combined value of any Checking, Savings, Cash, CD accounts, including cash onhand. The section will separately ask you to list the combined value of any stocks, securities, bonds, mutual funds held by your household.

- Current Value of Checking/Savings/Cash/CD Accounts: _____
- Current Value of Stocks/Securities/Bond/Mutual Funds Accounts: _____

Section 14: Assets- Retirement Plans

This section asks you to list the current combined value of any Self-Managed Retirement Accounts (i.e. IRA, SEP, etc). This section will separately ask you to list the current combined value of any “Other-Managed” retirement accounts (401k, 403b, etc). Do not include any pension accounts in this section.

You will also be asked to list 2026 specific contributions made to these accounts by your household and any contributions made by your employer.

- Total Current Value of Self-Managed Retirement Accounts: _____
- Total Current Value of Other-Managed Retirement Accounts: _____
- 2026 Household Contributions to Retirement Accounts: _____
- 2026 Employer Contributions to Retirement Accounts: _____

Section 15: Medical Expenses

This section asks you to list information about medical expenses for the year 2026. You will be asked to list medical expenses paid out of pocket (co-pays, medical bills paid by your family, etc). Separately, you will be asked to list any medical debts that are outstanding (unpaid). Finally, you will also be asked to list your medical premium expenses paid in 2026 for your insurance.

- 2026 Out of Pocket Medical/Dental Expenses Paid _____
- Current Outstanding Medical/Dental Debt _____
- 2026 Medical/Dental Insurance Premiums _____
- 2026 Out of Pocket Prescription Drug Expenses Paid _____
- Current Outstanding Prescription Drug Debt _____
- 2026 Medical/Dental Prescription Drug Premiums _____
- 2026 Out of Pocket Prescription Eyeware Expenses Paid _____
- Current Outstanding Prescription Eyeware Debt _____
- 2026 Prescription Eyeware Premiums _____

Section 16: Alimony and Child Support Expenses

This section asks you to list information about alimony and child support expenses paid by your household to others. Do not include alimony and child support amounts RECEIVED by your household (these amounts should be listed in Section 5- Other Monthly Income).

- 2026 Child Support Paid to Others: _____
- 2027 Estimated Child Support to be paid to Others: _____
- 2026 Alimony Paid to Others: _____
- 2027 Alimony to be paid to Others: _____

Section 17: Day Care and Elderly/Disabled Care Expenses

This section asks you to list day care expenses paid in 2026 and estimated to be paid in 2027. Daycare expenses include any amounts paid to cover child care during the work day (including summer day camps). Do not include specialty/overnight day care expenses here or babysitting expenses on evenings or weekends, unless they are covering your work hours. Do not include tuition

costs for private or independent schools, as we will ask for this information in Sections 22-24. This section separately asks you to list any expenses paid for the care of elderly or disabled persons.

- 2026 Child Care Expenses: _____
- 2027 Estimated Child Care Expenses: _____
- 2026 Elderly/Disabled Care Expenses: _____
- 2027 Elderly/Disabled Care Expenses: _____

Section 18: Charitable Giving

If you made tax deductible donations to non-profit organizations in 2026, list the three organizations you donated the most to and the amount of each of those donations.

- Charity #1 Name: _____
- Charity #1- Household Contribution in 2026: _____
- Charity #2 Name: _____
- Charity #2 – Household Contribution in 2026: _____
- Charity #3 Name: _____
- Charity #3 – Household Contribution in 2026: _____

Section 19: Miscellaneous Debt

In this section, you will be asked to list debt amounts for items that you have not already listed. Please list the total outstanding dollar amount for each item. Do not include medical debt, vehicle debt, home loans, or home equity loans/second mortgages, as these were listed in previous sections. If you have more than one debt/outstanding loan for each item, add all balances together and enter the total amount. Documentation of any debt listed may be required after submission of your application

- Current Outstanding Credit Card Debt: _____
- Current Outstanding Loan Company Debt: _____
- Current Outstanding Loans/Debt to Friends or Family: _____
- Current Outstanding Educational Debt for Parent(s)/Guardian(s): _____
- Current Outstanding Educational Debt for Dependent(s) in the household (if debt was taken out by parent(s)/guardian(s)): _____
- Other Current Outstanding Debt (not already listed): _____

Section 21: Contributions to Education (2027-28)

Enter the amount you can realistically contribute from the following sources toward private/independent education tuition for all children in your household. This should include contributions for all children applying for financial aid and any attending other private schools or colleges in your household.

- How much (in your opinion) can the heads of household contribute towards the tuitions for *all dependents* in this household for the 2027-28 school year?: _____
- How much is a non-custodial parent ordered by law to pay for all dependents in this household for the 2027-28 school year?: _____

- Provide the amount that you will receive in support for tuition from other sources (grandparents, outside scholarships) for the 2027-28 school year:

Section 22: Tuition Charging Schools

In this section you want to list any tuition charging schools that ANY of your dependents will be attending for the next school year.

The school you selected at the beginning of the application is already listed here. In this section, you will want to add any other schools that any children in your household are attending, as well as any colleges or other private schools that any dependent(s) in your household will be attending for the upcoming school year. Click “Add Additional School” to add another school.

If your additional dependents are attending public school or not attending any school, you do not need to list any additional schools here.

Section 23: Dependents in the Household

In this section, please list any dependent (excluding parent(s)/guardian(s)) that you can claim on your 1040 tax form as a dependent. Any child living in your household for six months or more per year and under 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 #1 Name: _____

- Dependent #1- Earnings (if employed): _____
- Dependent #1- Current Savings: _____
- Dependent #1- Amount Dependent can contribute to education from 529 Savings Plan for the 2027-28 year: _____
- Dependent #1- Educational Expenses for Bus, Books, Uniforms and Additional Fees:

Dependent #2 Name: _____

- Dependent #2- Earnings (if employed): _____
- Dependent #2- Current Savings: _____
- Dependent #2- Amount Dependent can contribute to education from 529 Savings Plan for the 2027-28 year: _____
- Dependent #2- Educational Expenses for Bus, Books, Uniforms and Additional Fees:

Dependent #3 Name: _____

- Dependent #3- Earnings (if employed): _____
- Dependent #3- Current Savings: _____
- Dependent #3- Amount Dependent can contribute to education from 529 Savings Plan for the 2027-28 year: _____
- Dependent #3- Educational Expenses for Bus, Books, Uniforms and Additional Fees:

Dependent #4 Name: _____

- Dependent #4- Earnings (if employed): _____
- Dependent #4- Current Savings: _____
- Dependent #4- Amount Dependent can contribute to education from 529 Savings Plan for the 2027-28 year: _____
- Dependent #4- Educational Expenses for Bus, Books, Uniforms and Additional Fees: _____

Dependent #5 Name: _____

- Dependent #5- Earnings (if employed): _____
- Dependent #5- Current Savings: _____
- Dependent #5- Amount Dependent can contribute to education from 529 Savings Plan for the 2027-28 year: _____
- Dependent #5- Educational Expenses for Bus, Books, Uniforms and Additional Fees: _____

Section 24: School Selection and Review

This section will require you to “match” the schools you added in section 22 with the dependents you listed in section 23. Each school added must have at least one dependent applying. You must also match every dependent to either a school, public school/home school, or not attending any school.

Section 25-26: Supplemental Questions and Review

If the school you are applying for has any supplemental questions, you will be asked to answer those questions in the next section.

Household Questions

You may have supplemental questions to complete for the entire household. Responses may generate additional questions.

Student Questions

You may have supplemental questions to complete for the entire household. Responses may generate additional questions.

Review

The last page of the application will review your completed information. If you have completed each section of the application, you will have a green checkmark after each section. If you need to navigate back to any section within the application, you will see a red arrow. Please click on the respective section to review or update the information listed. Upon completing this review, you will be taken to a page to pay for your application and submit the application to the school.

Receive Reference Number and Submit Documentation

Once the application is completed, you will receive a 7-digit reference number confirming your submission. You will also receive a list of required documentation that must be submitted to TADS in order to complete your application process. Navigate to the “Required Documents” tab on the left side of your TADS account to upload documents.

Please note you will only see document requirements after fully submitting the online application and receiving a reference number.

How Do I Submit the Required Documents?

1. Complete your application at secure.tads.com
2. Upon completing your application, you will receive a seven-digit reference number which will confirm the submission of your online application
3. Make sure the document you would like to submit is saved as a document to the computer or device you're using
4. Navigate to the Required Documents tab on the left side of your screen when logged into your account on secure.tads.com
5. Any documents that are required for you to submit will be listed on the following page as required
6. Click "Upload Document" next to the document you would like to upload
7. On the next page, click "Choose File"
8. A pop-up will appear on your screen asking you to locate the document on your computer. You will be asked if the file requires a password to open and will be prompted to enter password, if applicable
9. Click the green Upload button and look for the confirmation banner

What Happens After I Submit Documentation to TADS?

Upon submitting documentation, the TADS Financial Aid Support Team will review applications to ensure that the required documentation for each application has been submitted and will contact you regarding any missing documentation and/or discrepancies on the application against the documentation submitted.

Questions?

Please contact our Chat Support by accessing the help bubble on your account. Chat is available 24/7, with specialists available during business hours.

Please note that this is a worksheet to help prepare you to fill out the TADS Financial Aid application and will not be accepted by TADS as an application. **Do not send this form to TADS or your school.** When you are ready to complete an online application, go to secure.tads.com to create an account. Once logged in, click "I would like to apply for financial aid" to start your application.