

Name \_\_\_\_\_  
(Last) (First)



## 2012-2013 **LC** Application for Financial Aid

(for the academic year September 2012-May 2013)

# LIST COLLEGE

APPLICATION DEADLINE:  
**MARCH 1, 2012 FOR ALL STUDENTS**  
LATE APPLICATIONS WILL NOT BE ACCEPTED

### THE FOLLOWING MATERIALS MUST BE RECEIVED BY THE MARCH 1, 2012 DEADLINE:

- JTS APPLICATION (THIS APPLICATION)
    - including the VERIFICATION WORKSHEET
    - including the NON-FILING STATEMENT (if applicable)
  - STUDENT AID REPORT (GENERATED FROM THE FAFSA)  
(Canadian students do not complete the FAFSA)
  - REQUIRED 2011 TAX RETURNS (**tax returns must be signed**)
    - including your 2011 U.S. or Canadian tax return
    - including your parents' 2011 U.S. or Canadian tax return
- REMINDER: You must submit a copy of the required 2011 U.S. Tax Return Transcripts to the JTS financial aid office by May 1, 2012.**
- SUPPORTING DOCUMENTATION

## NEW U.S. TAX RETURN REGULATIONS FOR FINANCIAL AID APPLICANTS

Beginning with the 2012-2013 academic year, U.S. government regulations require financial aid applicants (and their parents or spouse, if applicable) to submit U.S. Tax Return Transcripts. Financial aid offices may no longer rely on copies of tax returns to award financial aid. We want to ensure that the financial aid process runs smoothly for you and that you receive your financial aid award letter and have your award credited to your account without any delays or problems.

To expedite this process, the JTS Financial Aid Office has made some changes to our required tax return submission procedures. There are two options to submit tax documentation to qualify for financial aid consideration:

### **Option 1:** Use this option if you are able to file your tax return electronically by February 15<sup>th</sup>:

1. Use the IRS Data Retrieval process when completing the FAFSA online ([www.fafsa.ed.gov](http://www.fafsa.ed.gov)). You will be provided with instructions to link to the IRS while completing the FAFSA. If you choose to use the IRS Data Retrieval Tool, certain data elements will be automatically populated for you on the FAFSA. Because this data comes directly from the tax return you filed with the IRS, you will not need to submit any other tax documentation to the financial aid office - neither tax transcripts nor copies of tax returns (although you may be required to provide proof of untaxed income).

2. File your tax return electronically at least two weeks prior to using the IRS retrieval tool. You will need to file by February 15<sup>th</sup>, 2012 to ensure that you meet JTS' March 1, 2012 financial aid deadline.

Please note: *The IRS data retrieval tool will be not be available until February 1, 2012 on the FAFSA website. To use the IRS retrieval tool, you must complete your FAFSA after February 1.*

### **Option 2:** Use this option if you cannot file your tax return electronically by February 15<sup>th</sup> or if you file a paper return. *BOTH* steps 1 *AND* 2 must be completed:

1. Submit a signed copy of your (and your parents' or spouse's if applicable) completed U.S. tax return (form 1040, 1040A or 1040EZ) with your JTS financial aid application by the March 1, 2012 deadline. Submitting a signed copy of required tax returns by March 1, along with your completed financial aid application, will guarantee that your application will be considered for financial aid.

Please note: *No exceptions will be made – the completed application and tax return(s) must be submitted by March 1<sup>st</sup>. Prepare your tax returns by March 1<sup>st</sup> to ensure that you do not miss this deadline. You only need to send us an exact copy of the return that you will be submitting to the IRS by March 1<sup>st</sup> even if you and your family do not actually file the returns with the IRS until April 15<sup>th</sup>.*

2. You (and your parents or spouse if applicable) must submit a U.S. Tax Return Transcript to the JTS Financial Aid Office by May 1, 2012 to actually receive your financial aid. Your financial aid award will not be disbursed unless we receive your U.S. Tax Return Transcript(s) by May 1<sup>st</sup>.

You may submit your U.S. Tax Return Transcript by either of these two methods:

- Using the IRS Data Retrieval Tool when completing or correcting your FAFSA online. You will not need to submit a hard copy of the Tax Return Transcript if you use the retrieval tool.

Please note: To be eligible to use the IRS retrieval tool, you must already have filed your federal tax return, and the IRS must have had time to process it. (The IRS processing time can take 2-8 weeks, depending on whether you filed electronically or on paper.)

- Requesting a tax return transcript from the IRS. Your Tax Return Transcript should be available between 2 and 8 weeks from the time you file your tax return with the IRS, depending on whether you file electronically or on paper. To request your Tax Return Transcript:
  1. Go to the IRS website [www.irs.gov](http://www.irs.gov).
  2. Under the “Tools” section on the homepage, click “Order a Tax Return or Account Transcript”.
  3. Follow the instructions to order your Tax Return Transcript. (Make sure you do *NOT* order a Tax “Account” Transcript, as this form does not have the required information on it.)
  4. You should receive your Tax Return Transcript within 5 to 10 days.
  5. When you receive your Tax Return Transcript, submit it to the JTS Financial Aid Office.

IF YOU HAVE ANY QUESTIONS ABOUT SUBMITTING YOUR TAX RETURN TRANSCRIPT TO OUR OFFICE, PLEASE CONTACT THE JTS FINANCIAL AID OFFICE AT [FINANCIALAID@JTSA.EDU](mailto:FINANCIALAID@JTSA.EDU). IF YOU HAVE ANY QUESTIONS ABOUT USING THE IRS DATA RETRIEVAL TOOL AS YOU COMPLETE THE FAFSA, PLEASE USE THE FAFSA ON THE WEB “LIVE HELP” OR CALL THE FAFSA HOTLINE AT 800-4-FED-AID.

**PERSONAL INFORMATION**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I.: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ (MM-DD-YY)

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Permanent Address: \_\_\_\_\_  
 \_\_\_\_\_ ZIP: \_\_\_\_\_ Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Cell Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

Marital Status: \_\_\_\_\_ Single; \_\_\_\_\_ Married/Partnered; \_\_\_\_\_ Engaged\*\*  
 \*\*If engaged, give expected date of marriage: \_\_\_\_\_

Are you a U.S. citizen? \_\_\_\_\_ If not, are you a Permanent Resident? \_\_\_\_\_

**IF A PERMANENT RESIDENT, PLEASE PROVIDE A PHOTOCOPY OF YOUR ALIEN REGISTRATION (GREEN) CARD!**

**ENROLLMENT INFORMATION**

In the 2012-2013 Academic Year what program will you be in? \_\_\_\_\_ Joint Program/Columbia; \_\_\_\_\_ Double Degree/Barnard

Year in JTS school beginning September 2012:

\_\_\_\_\_ 1<sup>st</sup> year; \_\_\_\_\_ 2<sup>nd</sup> year; \_\_\_\_\_ 3<sup>rd</sup> year; \_\_\_\_\_ 4<sup>th</sup> year; \_\_\_\_\_ 5<sup>th</sup> year

Indicate the number of credits for which you will register each semester. First year students, please enter: JTS – 10 in Fall and 9 in Spring; Columbia/Barnard – 6 in Fall and 9 in Spring.

at JTS: Fall: \_\_\_\_\_ Spring: \_\_\_\_\_  
 at Columbia/Barnard: Fall: \_\_\_\_\_ Spring: \_\_\_\_\_

In the 2012-2013 Academic Year, do you plan to live in JTS housing? \_\_\_\_\_ Yes; \_\_\_\_\_ No

**FAMILY INFORMATION**

Dependent Family Member Listing (in your Parent(s)' Household) for the 2012-2013 Academic Year:

Name	Relationship to student	Age	Attending college in 2012-13? (yes/no)	College name (if attending in 2012-13)	Year in school (in 2012-13)	Enrolled full-time?	Enrolled half-time?

**STUDENT'S FINANCIAL INFORMATION**

1. Do you plan to work at Camp Ramah during Summer 2012? Yes \_\_\_\_\_ No \_\_\_\_\_
2. Do you have a trust fund? Yes \_\_\_\_\_ No \_\_\_\_\_ If Yes, indicate net worth: \$ \_\_\_\_\_

**CANADIAN STUDENTS** also complete this section

**PLEASE CONVERT TO U.S. DOLLARS**



What is the total value of your assets (including bank accounts, investments, real estate)? \$ \_\_\_\_\_

**PARENT INFORMATION** (To be completed by Custodial parent(s).)

1) How much do parents plan to contribute to the student's education for the 2012-2013 Academic Year? \$ \_\_\_\_\_

<input type="checkbox"/> Mother <input type="checkbox"/> Stepmother <input type="checkbox"/> Legal guardian
Name _____ Age _____
Email address _____
<input type="checkbox"/> Self-employed
<input type="checkbox"/> Unemployed: Date last employed _____
Occupation _____
Employer _____ No. years _____

<input type="checkbox"/> Father <input type="checkbox"/> Stepfather <input type="checkbox"/> Legal guardian
Name _____ Age _____
Email address _____
<input type="checkbox"/> Self-employed
<input type="checkbox"/> Unemployed: Date last employed _____
Occupation _____
Employer _____ No. years _____

2) Parent Income and Asset Information:

a. Parent(s)' monthly home mortgage/rental payment \$ \_\_\_\_\_

b. Home:

Current home value \$ \_\_\_\_\_ Year purchased \_\_\_\_\_

Current home debt \$ \_\_\_\_\_ Purchase price \$ \_\_\_\_\_

c. Parsonage (annual amount): \_\_\_\_\_

**CANADIAN PARENTS** also complete this section

**PLEASE CONVERT TO U.S. DOLLARS**



Balance in all checking and savings accounts \$ \_\_\_\_\_

Investments:

Total investment value \$ \_\_\_\_\_ (stocks, bonds, CDs, etc.)      Total real estate value \$ \_\_\_\_\_ (not including primary residence)

Total investment debt \$ \_\_\_\_\_      Total real estate debt \$ \_\_\_\_\_

Business:

Current business value \$ \_\_\_\_\_ (include all businesses)

Current business debt \$ \_\_\_\_\_

3) Parent expected year income (for 2012):

Father's earnings \$ \_\_\_\_\_

Other taxable income \$ \_\_\_\_\_

Mother's earnings \$ \_\_\_\_\_

Untaxed income and benefits \$ \_\_\_\_\_

4) Medical Expenses:

Medical and dental expenses not covered by insurance: in 2011 \$ \_\_\_\_\_ expected in 2012 \$ \_\_\_\_\_

5) Divorced or Separated Parents:

(The Non-Custodial parent must submit a copy of his/her 2011 U.S. tax return transcript or Canadian tax return.)

Other parent's name \_\_\_\_\_ Occupation/Employer \_\_\_\_\_

Date of divorce or separation \_\_\_\_\_

According to court order, when will (did) support for the student end? \_\_\_\_\_

Is there an agreement specifying a contribution for student's education? Yes \_\_\_\_\_ No \_\_\_\_\_

If Yes, what is the amount specified in the agreement? \_\_\_\_\_

**OUTSIDE SCHOLARSHIPS**

If you are receiving any outside scholarships or awards for the 2012-2013 academic year, list sources and amounts:

Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  Application Pending or  Awarded?

Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  Application Pending or  Awarded?

**EXPLANATIONS/SPECIAL CIRCUMSTANCES**

Use this space to supply additional information that you think will help us better evaluate your situation. You may attach additional sheets and documentation if necessary.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CERTIFICATION**

I certify that all of the information on this form is true and complete to the best of my knowledge.

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

Mother's Signature \_\_\_\_\_ Date \_\_\_\_\_  
(or stepmother's)

Father's Signature \_\_\_\_\_ Date \_\_\_\_\_  
(or stepfather's)

**\*Handwritten signatures are required on all financial aid application forms.\***



LIST COLLEGE STUDENTS

# 2012-2013 Verification Worksheet

## Federal Student Aid Programs

Your application was selected for review in a process called "verification". JTS will be comparing information from your application with copies of your and your parent(s)' 2011 Federal Tax Return Transcripts, or with W-2 forms or other financial documents. Federal regulations require JTS to ask you for this information before awarding Federal aid. If there are differences between your application information and your financial documents, you may need to send in corrections using your Student Aid Report (SAR), or JTS may send corrections electronically.

Complete this verification form and submit it to the JTS financial aid office as soon as possible.

### What you should do

- ❶. Collect your and your parent(s)' financial documents (Federal Tax Return Transcripts, W-2 forms, etc.).
- ❷. Contact your JTS financial aid administrator if you have questions about completing this worksheet.
- ❸. You and at least one parent should complete and sign the worksheet.
- ❹. Submit the completed worksheet, tax forms, and any other documents JTS has requested to your JTS financial aid administrator.
- ❺. Your JTS financial aid administrator will compare information on the documents.

### A. Student Information

Last Name	First Name	M.I.	Social Security Number
Address (include apt. no.)			Date of Birth
City	State	Zip code	Phone Number (include area code)

### B. Family Information

List the people in your **parent(s)' household**; include:

- yourself and your parent(s) (including stepparents) even if you don't live with your parents, and
- your parents' other children, even if they don't live with your parents, if (a) your parents will provide more than half of their support from July 1, 2012 through June 30, 2013, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- other people if they currently live with your parents, and your parents provide more than half of their support and will continue to provide more than half of their support from July 1, 2012 through June 30, 2013.

Also write in the name of the college for any household member, excluding your parent(s), who will be attending college at least half-time between July 1, 2012 and June 30, 2013, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Age	Relationship	College
Marsha Cohen (example)	18	Sister	City University
		Self	

## C. Student's Tax Forms and Income Information (all applicants)

Dependent

1. Check only one box below.

- Check if you have transferred your 2011 tax information into your 2012-2013 FAFSA using the IRS Data Retrieval Tool.
- Check if you are attaching a copy of your 2011 Tax Return Transcript.
- Check if you are attaching a signed copy of your 2011 tax return form (the 1040, 1040A or 1040EZ). REMEMBER: You must submit a copy of your Tax Return Transcript to the JTS financial aid office by May 1, 2012.
- Check here if you will not file and are not required to file a 2011 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the Free Application for Federal Student Aid)

Sources of Untaxed Income	2011 Amount	Sources of Untaxed Income	2011 Amount
a. Child Support	\$	e.	\$
b. Social Security (non-taxed)	\$	f.	\$
c. Welfare (including TANF)	\$	g.	\$
d. Food Stamps	\$	h.	\$

3. If you did not file and are not required to file a 2011 Federal income tax return, list below your employer(s) and any income received in 2011 (use the W-2 form or other earnings statements if available).

Sources	2011 Amount
	\$
	\$
	\$

## D. Parent(s)' Tax Forms and Income Information

1. Check only one box below.

- Check if you have transferred your parent(s)' 2011 tax information into your 2012-2013 FAFSA using the IRS Data Retrieval Tool.
- Check if you are attaching a copy of your parent(s)' 2011 Tax Return Transcript.
- Check if you are attaching a signed copy of your parent(s)' 2011 tax return form (the 1040, 1040A or 1040EZ). REMEMBER: you must submit a copy of your parent(s)' Tax Return Transcript by May 1, 2012.
- Check here if your parent(s) will not file and are not required to file a 2011 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the Free Application for Federal Student Aid)

Sources of Untaxed Income	2011 Amount	Sources of Untaxed Income	2011 Amount
a. Child Support	\$	e.	\$
b. Social Security (non-taxed)	\$	f.	\$
c. Welfare (including TANF)	\$	g.	\$
d. Food Stamps	\$	h.	\$

3. If your parent(s) did not file and are not required to file a 2011 Federal Income Tax return, list below your parent(s)' employer(s) and any income they received in 2011 (use the W-2 form or other earnings statements if available).

Sources	2011 Amount
	\$
	\$
	\$

## E. Sign this Worksheet

By signing this worksheet, we certify that all the information reported on it is complete and correct. The student and at least one parent must sign.

\_\_\_\_\_  
Student Date

\_\_\_\_\_  
Parent Date

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined or sentenced to jail as indicated by US federal government regulations.

*\*Handwritten signatures are required on all financial aid application forms.\**



**JTS 2011 NON-FILING STATEMENT**  
**LIST COLLEGE 2012-2013 Financial Aid Application**

STUDENT'S NAME \_\_\_\_\_ SSN \_\_\_\_\_

**SECTION ONE: STATEMENT OF INCOME**

WHO MUST COMPLETE THIS SECTION:

Students and/or Parents who will **not** file a 2011 Federal Tax Return

Student    Mother    Father   **My/Our income in 2011 was** \_\_\_\_\_  
(please check all that apply)

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**SECTION TWO: EXPLANATION OF HOW 2011 EXPENSES WERE MET**

Please list the sources and amounts of money received to pay expenses.

Source of money for 2011: \_\_\_\_\_ Amount: \_\_\_\_\_

Source of money for 2011: \_\_\_\_\_ Amount: \_\_\_\_\_

Source of money for 2011: \_\_\_\_\_ Amount: \_\_\_\_\_

Source of money for 2011: \_\_\_\_\_ Amount: \_\_\_\_\_

**\*\*\*W-2 forms are required. Attach all W-2s to this form.\*\*\***

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**SECTION THREE: SIGNATURES**

I certify that I have not filed and will not file a 2011 federal tax return.

I also certify that all the information on this form is true and correct to the best of my knowledge.

*Only the non-filing individual(s) must sign this form.*

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

Mother's Signature \_\_\_\_\_ Date \_\_\_\_\_  
(or stepmother's)

Father's Signature \_\_\_\_\_ Date \_\_\_\_\_  
(or stepfather's)

**\*Handwritten signatures are required on all financial aid application forms.\***