

FACS

PARENTS' FINANCIAL STATEMENT (CONFIDENTIAL)
Financial Aid for Canadian Students
Academic Year 2010-2011

Check box if you have filed a Parents' Financial Statement for a previous academic year

1. STUDENT APPLICANT	LAST NAME <input type="text"/>	FIRST NAME <input type="text"/>	M.I. <input type="text"/>
(if more than one student applicant list all students in section 24 and/or 25)			
	SEX <input type="checkbox"/> M <input type="checkbox"/> F	STUDENT'S DATE OF BIRTH MONTH <input type="text"/> DAY <input type="text"/> YEAR <input type="text"/>	IF ALREADY ENROLLED IN THE SCHOOL PLEASE NOTE STUDENT # <input type="text"/>
2. PARENTS' ADDRESS FOR ALL CORRESPONDENCE	NUMBER & STREET <input type="text"/>		
	CITY <input type="text"/>		PROV./COUNTRY <input type="text"/>
	POSTAL CODE <input type="text"/>		
3. Are you using Cdn funds on this application? <input type="checkbox"/> Yes - If not then what currency? U.S.\$ <input type="checkbox"/> Other <input type="checkbox"/>			
4. Grade applicant will enter in September 2010 <input type="text"/>		5. Check (circle) all that apply:	
6. Indicate whether day or boarding: <input type="checkbox"/> Day <input type="checkbox"/> Boarding		a <input type="checkbox"/> Applicant's parents together	
7. Check box(es) for all persons whose financial data are entered on this form		b <input type="checkbox"/> Applicant's parents separated/divorced	
a <input type="checkbox"/> Father	e <input type="checkbox"/> Male Guardian	c <input type="checkbox"/> Single parent	
b <input type="checkbox"/> Mother	f <input type="checkbox"/> Female Guardian	d <input type="checkbox"/> Father/Mother deceased	
c <input type="checkbox"/> Stepfather	g <input type="checkbox"/> Other person contributing to/or supporting the household	e <input type="checkbox"/> Applicant's mother remarried/lvg common law	
d <input type="checkbox"/> Stepmother		f <input type="checkbox"/> Applicant's father remarried/lvg common law	
8. Student applicant lives with (Check all that apply):		9. Parent association with the school	
a <input type="checkbox"/> Father	c <input type="checkbox"/> Stepfather	e <input type="checkbox"/> Male Guardian	g <input type="checkbox"/> Other
b <input type="checkbox"/> Mother	d <input type="checkbox"/> Stepmother	f <input type="checkbox"/> Female Guardian	Parent
		<input type="checkbox"/> Past Student <input type="checkbox"/> Staff <input type="checkbox"/> None	
		<input type="checkbox"/> School Board/Committee/Association	
10. FATHER, STEPFATHER OR OTHER PARENT		MOTHER, STEPMOTHER OR OTHER PARENT	
NAME	AGE	NAME	AGE
OCCUPATION		OCCUPATION	
(if you are self employed please note your profession/occupation)			
POSITION:		POSITION:	
EMPLOYED BY:	YEARS	EMPLOYED BY:	YEARS
11. How many children, including student applicant, are residing in your home and will receive support from you in 2010/2011? <input type="text"/>			
Please provide detail on all children on page four, regardless of where they are attending school			
12. How many children entered above will be attending tuition-charging institutions in 2010/2011? <input type="text"/>			
13. Check name(s) of the schools to which copies of the application and FACS analysis reports are to be sent.			
<input type="checkbox"/> Albert College	<input type="checkbox"/> Ecole Bilingue Notre Dame	<input type="checkbox"/> Montessori Jewish Day Sch	<input type="checkbox"/> St. John's-Ravenscourt
<input type="checkbox"/> Alexander von Humboldt	<input type="checkbox"/> Edge School for Athletes	<input type="checkbox"/> Mulgrave School	<input type="checkbox"/> St. Lawrence Christian Acad
<input type="checkbox"/> Appleby College	<input type="checkbox"/> Elmwood School	<input type="checkbox"/> Nat'l Ballet School	<input type="checkbox"/> St. Michael's College
<input type="checkbox"/> Ashbury College	<input type="checkbox"/> Glenlyon Norfolk	<input type="checkbox"/> Notre Dame College	<input type="checkbox"/> St. Michaels Univ. School
<input type="checkbox"/> Aspengrove School	<input type="checkbox"/> Halifax Grammar School	<input type="checkbox"/> Ottawa Montessori	<input type="checkbox"/> St. Thomas Villanova
<input type="checkbox"/> Balmoral Hall School	<input type="checkbox"/> Havergal College	<input type="checkbox"/> Peoples Christian Acadmy	<input type="checkbox"/> The Alan Howard Waldorf
<input type="checkbox"/> Bannockburn	<input type="checkbox"/> Hawthorn School for Girls	<input type="checkbox"/> Pickering College	<input type="checkbox"/> The Mabin School
<input type="checkbox"/> Bayview Glen	<input type="checkbox"/> Hillfield Strathallan	<input type="checkbox"/> Pretty River Academy	<input type="checkbox"/> The Priory School
<input type="checkbox"/> Bishop Strachan School	<input type="checkbox"/> Holy Name of Mary College	<input type="checkbox"/> Ridley College	<input type="checkbox"/> The Rosedale School
<input type="checkbox"/> Bishop's College School	<input type="checkbox"/> Holy Trinity School	<input type="checkbox"/> Rosseau Lake College	<input type="checkbox"/> The Sacred Heart School
<input type="checkbox"/> Branksome Hall	<input type="checkbox"/> Institute of Child Study	<input type="checkbox"/> Rothesay Netherwood	<input type="checkbox"/> The Study
<input type="checkbox"/> Brentwood College School	<input type="checkbox"/> Kawartha Montessori	<input type="checkbox"/> Royal St. George's	<input type="checkbox"/> The York School
<input type="checkbox"/> Brockton Preparatory	<input type="checkbox"/> Kingsway College	<input type="checkbox"/> Selwyn House School	<input type="checkbox"/> Toronto Montessori
<input type="checkbox"/> Centennial Acadmy/Clge	<input type="checkbox"/> Lakefield College	<input type="checkbox"/> Southridge School	<input type="checkbox"/> Toronto Waldorf
<input type="checkbox"/> Christ Church Cathedral	<input type="checkbox"/> Lower Canada College	<input type="checkbox"/> Stanstead College	<input type="checkbox"/> Trafalgar School for Girls
<input type="checkbox"/> Clear Water Academy	<input type="checkbox"/> Loyola High School	<input type="checkbox"/> Strathcona Tweedsmuir	<input type="checkbox"/> Trinity College School
<input type="checkbox"/> Collingwood School	<input type="checkbox"/> Lycee Louis Pasteur	<input type="checkbox"/> St. Andrew's College	<input type="checkbox"/> Univ. of Toronto Schools
<input type="checkbox"/> Crescent School	<input type="checkbox"/> Montcrest School	<input type="checkbox"/> St. Clement's School	<input type="checkbox"/> Upper Canada College
<input type="checkbox"/> Crestwood Preparatory Clge	<input type="checkbox"/> Montessori Hse of Children	<input type="checkbox"/> St. George's School-Vcr	
OTHER SCHOOLS			

PARENTS' AND SUPPORTERS' ANNUAL INCOME AND EXPENSES		
Enter information in boxes for all supporters of applicant(s).		
	2009*	Projected 2010
14. TOTAL WORLD WIDE INCOME BEFORE DEDUCTIONS:		
A. Salary - father, stepfather, common-law spouse, male guardian, other parent	\$	\$
Taxable benefits not included in salary above Car __, Housing __ Other __	\$	\$
B. Salary - mother, stepmother, common-law spouse, female guardian, other parent	\$	\$
Taxable benefits not included in salary above Car __, Housing __ Other __	\$	\$
C. Pension Income received	\$	\$
D. Federal and Provincial Government child tax benefits received	\$	\$
E. Spousal alimony or child support payments received. Is this taxable? Yes__ No__	\$	\$
F. Actual dividends received	\$	\$
G. Interest and Other Investment Income(including limited partnership income)	\$	\$
H. Total Capital Gains (record 100% not just 50%)	\$	\$
I. Net Rental Income(or loss) Gross \$ _____ Net>>>>>	\$	\$
J. Business Income Gross >>>>>	\$	\$
and/or Commission Income Gross >>>>>	\$	\$
and/or Partnership Income Gross >>>>>	\$	\$
less Business expenses >>>>>	\$ (_____)	\$ (_____)
less Car expenses written off for business >>>>>	\$ (_____)	\$ (_____)
less Home expenses written off for business >>>>>	\$ (_____)	\$ (_____)
K. Net Farming & Fishing Income Gross \$ _____ Net>>>>>	\$	\$
L. Other Income(Worker's Comp, EI, Social Assistance, non-taxable, etc.)	\$	\$
M. Trust Funds (capital or income) or gifts received by parents/applicant	\$	\$
TOTAL INCOME(all financial supporters)	\$	\$
*if T4 for 2009 has not yet been received provide best estimates using your most recent paycheque and provide a copy thereof.		
15. DEDUCTIONS		
A. Employee pension plan deductions (Box 20 on T4)	\$	\$
Registered Retirement Savings Plan contributions	\$	\$
B. Union and professional dues not already included in business expenses	\$	\$
C. Spousal alimony or child support payments. Is this tax deductible? Yes__ No__	\$	\$
D. Investment carrying charges	\$	\$
What does it relate to: _____		
E. Child or attendant care expenses (childcare/nanny) excludes private school amts	\$	\$
F. Other deductions	\$	\$
Medical expenses - Health Ins. premiums and out of pocket expenses	\$	\$
Donations - which are part of private school fees (if any)	\$	\$
Donations	\$	\$
H. Other deductions(provide details on a separate page)	\$	\$
TOTAL DEDUCTIONS	\$	\$
NET INCOME(all financial supporters)	\$	\$
16. TAXES PAID		
A. Total Provincial and Federal income taxes	\$	\$
B. Cda (Quebec) Pension Plan, Employment Insur	\$	\$
TOTAL TAXES PAID(all supporters)	\$	\$
17. NET INCOME After TAX(all supporters)	\$	\$

The following information should accompany the application in order for an analysis to be properly completed.

- . T4 (W2 for U.S. residents) for 2009, or 2008 if 2009 has not yet been issued along with a current pay statement.
- . Most recent **Revenue Canada Notice of Assessment Rec'd**, or **Form 1040** if a U.S. Resident

If you are **not a Canadian or U.S. resident** and **pay income taxes**, please send whatever tax documentation that would be applicable to your situation.

If neither of the above applies to your situation please provide some type of evidence of income earned.

If you draw earnings from your **own incorporated business**, enclose the latest financial statements;

If you have **rental income**, please enclose **Schedule T776**;

If you are **self-employed**, please provide a **Statement of Business/Prof Activities T2125**

If you have **farming /fishing income(or losses)**, please enclose **Schedule T2042 or T2121** whichever applies;

The schedules requested refer to the **detail pages**, not the summary.

IF THE ABOVE SCHEDULES ARE NOT YET PREPARED FOR 2009 ENCLOSE THE LAST ONE THAT WAS PREPARED

PARENTS' AND SUPPORTERS' ASSETS AND LIABILITIES

Enter information in boxes. Enter a zero (0) if no other entry applies.

19. CAPITAL AND RETIREMENT ASSETS

A. Home(if owned): Year purchased [] Present Market Value Mortgage(s) Outstanding Annual amount paid for Mortgage, Taxes & Condo Fees
Purchase price \$ []
B. Other Real Estate*: Year purchased [] Present Market Value Mortgage(s) Outstanding Annual amount paid for Mortgage, Taxes & Condo Fees
Purchase price \$ []

* list additional real estate (cottages, condos, ski chalets, etc.) under Section 26 or on a separate piece of paper

C. Bank Accounts - total including interest bearing chequing and savings accounts \$ []
D. Term Deposits/GIC's/Portfolio Investments/Shares/Mutual Funds/Bonds \$ []
E. Retirement Saving Assets(RRSPs,etc) Registered Education Savings Plans (RESPs) \$ []

F. BUSINESS INFORMATION Equity/Partnership/Farm Investments(more than 20%) Percent of ownership ___%
Total Assets (100%) \$ [] Gross Revenue \$ [] Net Share
Total Liabilities \$ [] After tax Profit \$ []

Please enclose a copy of the latest financial statements available.

H. Other Investments(mortgages, paintings, etc.) (what is it: []) \$ []

I. List family cars owned or leased 1. [] (make and year) 2. [] (make and year) Total value \$ [] Current total car debt \$ [] Annual loan/lease payments \$ []
J. List boats and other recreational vehicles 1. [] (make and year) 2. [] (make and year) Total value \$ [] Current total debt on above \$ []

K. If you pay rent for your present family residence, provide total annual rent \$ []

20. TOTAL DEBT AND LIABILITIES

L. Consumer debts owing-Personal loans, Lines of credit, Credit cards,etc(except debt already listed above) \$ []
M. Other debt - Revenue Cda []; School fees still owing for 2009/2010 and prior yrs. []
N. Other debt - Family loans []; [] Monthly personal debt payments under L,M and N \$ []

21. OTHER FINANCIAL INFORMATION

O. If someone else resides with you or contributes towards expenses, how much do they contribute? \$ []
P. Does father, stepfather, male guardian or other parent belong to an employee pension plan? Yes No
Q. Does mother, stepmother, female guardian or other parent belong to an employee pension plan? Yes No
R. Life Insurance Policies - face value \$ []
S. Trust funds of which any of the family are beneficiaries: \$ [] Restriction on use of trust funds?
T. Annual cost of club dues (Clubs: [], [], []) \$ []
U. Cost of summer camp in 2009 \$ [] Est. 2010 \$ []
V. Cost of vacation in 2009 \$ [] Est. 2010 \$ []
W. Indicate student applicant's income for calendar year 2009 \$ [] Est. 2010 \$ []
Receipts from gifts or trusts in 2009 \$ [] Est. 2010 \$ []
X. Student applicant's own net assets or trust fund assets which they are beneficiaries of \$ []

Separated or Divorced Parents

22. Joint/non-custodial parent's name: [] Address: []
Divorced [] Date [] Occupation: [] Firm: []
Separated [] Month Year Estimated Gross Earnings in 2009 \$ [] 2010 \$ []
Does any agreement specify educational expense contributions? Yes No
How much financial assistance did joint or non-custodial parent provide last year? \$ [] This yr? \$ []

Depending on the situation the following guidelines refer to information to be provided, if in doubt please phone or e-mail us.

- . Single custodial parent solely responsible for student, provide summarized information on other parent if available
. Both parents contributing towards fees, both parties should fill out an application for their share of costs and level of bursary requested
. Joint custody, however only one parent responsible for fees, will still require information on the financial status of the parent not providing funds towards fees and a second form should be provided with this information

This information is kept confidential from the other parties involved and can be sent either jointly or under separate cover

