



2026-2027

To Apply for Tuition Assistance in Academic Year 2026-2027

Guidelines for Completing the Parents' Financial Statement

The Parents' Financial Statement (PFS form) is used by Thomas Jefferson to assess a family's ability to pay tuition and related school costs each year. This form gathers your financial information regarding income, expenses, assets, and debts, and allows the school to analyze this information to make fair and objective tuition assistance decisions. Tuition assistance and/or scholarships cannot be awarded to families until they have completed the PFS form and provided the required documentation to substantiate this financial information.

Important Deadlines

- February** Families who currently have tuition assistance and/or scholarship awards will receive the PFS form from Thomas Jefferson in February so that they may gather the necessary information, complete the form, and return it to Thomas Jefferson timely.
- March** PFS forms must be completed and returned to Thomas Jefferson by **March 23rd** so that the Committee will have time to review and make recommendations for awards by the end of March.
Families who do not submit this application timely may jeopardize their student's enrollment at Thomas Jefferson. Thomas Jefferson sets a budget for tuition assistance and once funds have been awarded there may not be funds available for families who file late.
- April** All student enrollment contracts, including contracts for students on tuition assistance and/or scholarships, are issued the first of April and must be accepted and returned by May 1st. If you have not returned your tuition assistance application together with the supporting documentation, we cannot issue a contract and you may lose your student's spot in their class.

Gathering Information

Types of Questions You'll Answer in the PFS	Information to have handy to answer these questions
Questions about your family's income ("what you earn and receive") You will answer questions about income that is taxed and income that is not taxed. Questions about "taxable income" cover salaries/wages earned by parents and children; alimony; and taxable dividends or interest income. Questions about "non-taxable" income cover child support, social security benefits, etc.	* W-2 and/or 1099 form(s) * IRS Form(s) 1040 or 1040A * Social Security statements (SSA-1099 forms) * A sum of the child support you actually receive
Questions about the value of your assets ("what you own") Be ready to answer questions about the value of your home and what you pay. The PFS will also ask you about the vehicles you own and about investments and retirement plan accounts.	* Mortgage principal balance statements for your home(s) * Lease or finance statements showing the amount owed on vehicles * Bank, investment, and/or mutual fund statements * Retirement Plan account statements
Questions about your debts ("what you owe") These include questions about the amount you owe on your credit cards, as well as other debt you have incurred.	*Credit card statements * Bills/account statements showing major debt outstanding (for past educational expenses, past legal or funeral expenses, damage from natural disasters, etc.)
Questions about other family expenses These will include questions about medical and dental care expenses that weren't covered by insurance; and questions about cost of camps, lessons/tutors, and vacations.	* A sum of the expenses you paid for medical/dental premiums, as well as non-reimbursed amounts * A sum of expenses for camps/lessons/tutors * A sum of the expenses for vacations taken by all members of the family
Questions about how much you pay for educational expenses for all your children (not just the children for whom you are applying for tuition assistance).	* A sum of the expenses you pay for school, college, and childcare for EACH of your children.
Questions about business/rental property/farms you own or are a partner in These will include questions about the type of business, income and expenses for the business, assets and liabilities of the business.	*Financial statements for business *Balance sheet with assets and liabilities for business

Additional Resources

Instructions for completing the PFS form are available on our website at www.tjeffschool.org under Admissions - Tuition & Affordability - Financial Assistance. The PFS form is also located there should you need additional copies.
 All fields on the PFS are required to be completed and these instructions should explain what must be included.
 Other questions may be directed to Debie Donica, Business Manager by email at ddonica@tjeffschool.org.

Please complete the PFS form, sign, and return with REQUIRED documentation to Thomas Jefferson.

Please provide the following forms for tax year 2025:

Form 1040 , 1040A, or 1040EZ, including Schedule A, B, C, E, F and other supplemental forms

All W-2 forms



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A. Household Information Enter names exactly as they appear on tax/official forms. Questions marked with an asterisk (*) are CRITICAL - Your PFS cannot be accepted without these filled in.

1. Parent/Guardian A

First Name* _____ MI _____ Last Name* _____
 Address _____ Suite/Apt. No. _____
 City _____ State _____ Zip/Postal Code _____
 Email* _____ Date of Birth* (mm/dd/yy) _____ Gender ___M ___F
 Phone _____ Home ___ Work ___ Cell ___
 Employer * _____ Occupation _____ Yrs. w Employer _____

Parent/Guardian A will be our primary contact. Please provide phone and email address should we need to contact you.

2. Parent/Guardian B

First Name* _____ MI _____ Last Name* _____
 Address _____ Suite/Apt. No. _____
 City _____ State _____ Zip/Postal Code _____
 Email* _____ Date of Birth* (mm/dd/yy) _____ Gender ___M ___F
 Phone _____ Home ___ Work ___ Cell ___
 Employer * _____ Occupation _____ Yrs. w Employer _____

3. Other Parent

If the applicant(s) has another living biological or legal (adoptive) parent not listed above, complete this section.

Indicate the relationship between the

Parents/Guardians: _____ Never Married _____ Divorced _____ Separated, no court action _____ Separated, legally

Is there a Joint Custody Agreement? ___Yes ___No _____Yr. of divorce/separation

Other parent's first name _____ MI _____ Last Name _____

Address _____

City _____ State _____ Zip/Postal Code _____

B. Student Applicant Information Complete this section for each child applying to the school.

1. Applicant A

First Name* _____ MI _____ Last Name * _____

Date of Birth* (mm/dd/yy) _____ Grade applicant will enter in August 2026 _____

Applicant lives with ___ Parent/Guardian A&B ___ Parent/Guardian A ___ Parent/Guardian B ___ Other

Amount you can pay for this student for tuition for 2026-2027* \$ _____

2. Applicant B

First Name* _____ MI _____ Last Name * _____

Date of Birth* (mm/dd/yy) _____ Grade applicant will enter in August 2026 _____

Applicant lives with ___ Parent/Guardian A&B ___ Parent/Guardian A ___ Parent/Guardian B ___ Other

Amount you can pay for this student for tuition for 2026-2027* \$ _____

3. Applicant C

First Name* _____ MI _____ Last Name * _____

Date of Birth* (mm/dd/yy) _____ Grade applicant will enter in August 2026 _____

Applicant lives with ___ Parent/Guardian A&B ___ Parent/Guardian A ___ Parent/Guardian B ___ Other

Amount you can pay for this student for tuition for 2026-2027* \$ _____

4. Applicant D

First Name* _____ MI _____ Last Name * _____

Date of Birth* (mm/dd/yy) _____ Grade applicant will enter in August 2026 _____

Applicant lives with ___ Parent/Guardian A&B ___ Parent/Guardian A ___ Parent/Guardian B ___ Other

Amount you can pay for this student for tuition for 2026-2027* \$ _____

Basic Tax Information

Have you completed your 2025 Tax Return? Yes No **IF YES, PLEASE INCLUDE COMPLETED RETURN**
 Income tax filing status for 2025:
 1. Single 2. Married, joint return 3. Married, filing separately 4. Head of Household 5. Do not file

Total Taxable Income	2025	Estimated 2026
Salaries and wages for Parent/Guardian A <i>(Refer to W-2 form(s).)</i>	\$ _____	\$ _____
Salaries and wages for Parent/Guardian B	\$ _____	\$ _____
Taxable dividends and/or interest income <i>(Refer to your 1099 statement(s).)</i>	\$ _____	\$ _____
Business income-Farm income- <i>(complete Business Income sheet)</i>	\$ _____	\$ _____
Rental income- LLC income <i>(complete Business Income sheet)</i> <i>be sure to list the properties in section D</i>	\$ _____	\$ _____
Other taxable income <i>(Pensions, Annuities, IRA Distributions, Unemployment Compensation, Misc Income)</i>	\$ _____	\$ _____
Pre-tax payments made into an Individual Retirement Account (IRA)	\$ _____	\$ _____
Payments made into a Keogh plan and/or Simplified Employee Pension plan (SEP)	\$ _____	\$ _____
Other IRS allowable adjustments to taxable income	\$ _____	\$ _____

Total Nontaxable Income	2025	Estimated 2026
Child support received for all children	\$ _____	\$ _____
Social security benefits received by all members of your household	\$ _____	\$ _____

Other Nontaxable Income

Total pre-tax payments made to tax-deferred pension and savings plans as reported on W-2 form(s) <i>(Box 12)</i> . Include amounts withheld from earnings for qualified retirement plans, such as 401(k) and 403(b) plans		
	\$ _____	\$ _____
Total pre-tax contributions you made to a cafeteria or 125 plan		
	\$ _____	\$ _____
Total untaxed income your employer provided to a fringe benefit plan, such as HSA's		
	\$ _____	\$ _____
Total of all cash support, gifts, tuition paid on behalf, or money paid to you by relatives or non-relatives		
	\$ _____	\$ _____
Total amount paid or provided by separated or divorced spouse (in lieu of child support) to cover household expenses		
	\$ _____	\$ _____
Total value of military or clergy allowances you receive for housing, food, or other living expenses		
	\$ _____	\$ _____
Total cash value of food stamps and welfare benefits received		
	\$ _____	\$ _____
Total cash value of veteran's benefits received		
	\$ _____	\$ _____
Total income received from worker's compensation benefits		
	\$ _____	\$ _____
Total value of earned income credits received		
	\$ _____	\$ _____
Total income received from tax-exempt investments		
	\$ _____	\$ _____
Total income earned abroad		
	\$ _____	\$ _____
Other untaxable income and benefits not included above		
	\$ _____	\$ _____
Total Other Nontaxable Income	\$ _____	\$ _____

Notes: Use this space to provide additional information or explanation as needed.

D. Family Assets and Debts

Real Estate

2025

Estimated 2026

If you RENT the home you currently live in, provide the TOTAL amount paid/will pay in rent for the entire year. \$ _____ \$ _____

If you OWN the home you currently live in, please provide the following information:

Year purchased	Purchase price	Present market value	Unpaid Principal	Monthly Payment
\$ _____	\$ _____	\$ _____	\$ _____	\$ _____

If you have a second mortgage or home equity loan, provide the following information:

Unpaid Principal on 2nd Mortgage	Monthly Payment	Describe the purpose of the 2nd mortgage or equity loan
\$ _____	\$ _____	_____

If you own property other than your primary home, provide the following information for each property. Add'l properties may be listed on separate page.

Property 1: Address: _____

Purpose/Use of Property

Purchase price	Present market value	Unpaid Principal	Monthly Payment	<input type="checkbox"/> Addtl family income <input type="checkbox"/> Vacation home/timeshare <input type="checkbox"/> Other	<input type="checkbox"/> Rental Income <input type="checkbox"/> Vacant Land
\$ _____	\$ _____	\$ _____	\$ _____		

Property 2: Address: _____

Purpose/Use of Property

Purchase price	Present market value	Unpaid Principal	Monthly Payment	<input type="checkbox"/> Addtl family income <input type="checkbox"/> Vacation home/timeshare <input type="checkbox"/> Other	<input type="checkbox"/> Rental Income <input type="checkbox"/> Vacant Land
\$ _____	\$ _____	\$ _____	\$ _____		

Vehicles - Provide the following information about all vehicles (cars, recreational vehicles, boats) owned or leased by your family.

Vehicle 1

Type	Make	Model	Year
<input type="checkbox"/> Car <input type="checkbox"/> Boat <input type="checkbox"/> Recreational Vehicle	_____	_____	_____
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> Own <input type="checkbox"/> Lease <input type="checkbox"/> Employer/Business provided	\$ _____	\$ _____	_____

Vehicle 2

Type	Make	Model	Year
<input type="checkbox"/> Car <input type="checkbox"/> Boat <input type="checkbox"/> Recreational Vehicle	_____	_____	_____
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> Own <input type="checkbox"/> Lease <input type="checkbox"/> Employer/Business provided	\$ _____	\$ _____	_____

Vehicle 3

Type	Make	Model	Year
<input type="checkbox"/> Car <input type="checkbox"/> Boat <input type="checkbox"/> Recreational Vehicle	_____	_____	_____
Ownership Status	Current Debt	Annual Lease Cost	Notes
<input type="checkbox"/> Own <input type="checkbox"/> Lease <input type="checkbox"/> Employer/Business provided	\$ _____	\$ _____	_____

Other Assets/Debts - See Instruction Booklet for more detail on what should be reported.

Current

Bank accounts - total value of both parents' checking and savings (interest-bearing and noninterest bearing) accounts \$ _____

Investments - total net value of all your investments (Include stocks, bonds, mutual funds, and value of whole life insurance policies.) \$ _____

Is there an employee retirement plan for: Parent/Guardian A Yes NO Parent/Guardian B Yes NO

Total Value of company managed retirement plans, including pensions, 401K, 403b, or SEP Plans \$ _____

Total value of any self-managed retirement plans, including IRAs \$ _____

Total annual household contribution to all retirement savings plans \$ _____

Total consumer debts (Include balances from all credit card purchases NOT reported elsewhere in this form.) \$ _____

Total outstanding debt from: Past education of the Parent(s)/Guardian(s) (student loans) \$ _____

Any loans taken with a Loan Company \$ _____

Any loans taken from friends or relatives \$ _____

From interest-bearing medical expenses: \$ _____

Notes: Use this space to provide additional information or explanation as needed.

Other Expenses

Health Expenses

Do you have health insurance either through your employer or through the Affordable Care Act? ___ Yes ___ No
 Do you carry health insurance through a business that your own? ___ Yes ___ No
 Total amount you paid for health insurance premiums and plans: \$ _____
 Total health expenses you paid out of pocket that were not reimbursed by insurance or nontaxable benefit accounts such as HSA, FSA, DCA, HSR, etc: \$ _____

Child Support & Alimony Paid

	2025	2026 estimated
Total amount you paid in child support for Applicant 1:	\$ _____	\$ _____
Total amount you paid in child support for Applicant 2:	\$ _____	\$ _____
Total amount you paid in child support for all other dependents:	\$ _____	\$ _____
 Total amount you paid in alimony:	 \$ _____	
What tax year did you begin making alimony payments?	_____	

Additional Expenses

Total amount you paid in 2025 for utilities: \$ _____
 Total amount of charitable contributions in 2025: \$ _____
 Total amount you paid in 2025 for:
 Annual fee/club dues of more than \$250: \$ _____
 Camps, lessons, and sports teams for all members of your household: \$ _____
 Vacations for all members of your household: \$ _____
 Total amount of additional/unusual expenses you incurred: \$ _____

Expense for tuition

How many non applicant students will be attending tuition charging institutions? _____
 Amount to be paid for non applicant students attending tuition charging schools

		2025	Estimated 2026
Student	Tuition charging School		
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____

Notes: Use this space to provide additional information or explanation as needed.

Required Documentation	The following documents must be submitted with this application for consideration.
<p>Please provide the following forms for tax year 2025</p> <p>_____ Form 1040 , 1040A, or 1040EZ, including Schedule A, B, C, E, F and other supplemental forms</p> <p>_____ All W-2 forms</p>	
Parents Certification and Authorization	

We declare that the information reported on this form, to the best of our knowledge and belief, is true and correct, and complete. We recognize that intentionally providing false or inaccurate data may impact our ability to receive any financial aid and/or our ability to maintain a contact with the School.

Parent/Guardian A Signature _____

Parent/Guardian B Signature _____

Business/Rental/Farm Income*Use 2025 tax return or estimates if your taxes for the year in question have not yet been filed.*

This information is only asked of families who report income from a sole proprietorship, rental properties, farm, partnership, or LLC entity.
 If you are an owner/partner in more than one business/farm, provide the following for each business or farm you own interest in.

Business Information:

Owner(s)/partner(s) in business/rental/farm _____
 Business/rental/farm Name _____
 Year business/rental/farm operation began _____
 Business/Rental/Farm Type _____ Sole Proprietorship _____ Partnership _____ LLC Entity
 Address of business _____
 Description of service or product _____

Business Income:

	2025	Estimated 2026
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Gross receipts and sales	\$ _____	\$ _____
Cost of goods sold and or/operations	\$ _____	\$ _____
Other business/rental/farm income	\$ _____	\$ _____

Business Expenses:

Salaries/wages paid to you or your spouse	\$ _____	\$ _____
Other wages	\$ _____	\$ _____
Additional compensation	\$ _____	\$ _____
Business property rent	\$ _____	\$ _____
Business property mortgage	\$ _____	\$ _____
Depreciation	\$ _____	\$ _____
Other expenses	\$ _____	\$ _____
Amount paid for self-employment tax	\$ _____	\$ _____

Business/Rental/Farm Assets:

Current assets - cash	\$ _____	\$ _____
Land and buildings (present market value)	\$ _____	\$ _____
Accounts receivable	\$ _____	\$ _____
Other business/farm assets	\$ _____	\$ _____

Business/Rental/Farm Debts:

Mortgage on land and buildings	\$ _____	\$ _____
Debts on equipment and machinery	\$ _____	\$ _____
Other business or farm debts	\$ _____	\$ _____

Notes: Use this space to provide additional information or explanation as needed.
