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Student Tuition Assistance Financial Grant Form

(One form per family.)

2010/11 Tuition Assistance Application Deadline
Wednesday, April 28, 2010
NO EXCEPTIONS

Please note:

A copy of your most recent Federal Income Tax Return must accompany this application. All families applying for a grant must participate in the *Scrip Program*.

Return to either school office in the enclosed envelope labeled **Confidential**.
Please **do not** put your family name on the outside of the envelope.

Port Catholic Financial Grant Application

INSTRUCTIONS

GENERAL: This form should be filled out by the parent(s) of the child or children attending Port Catholic. If the parents are divorced or separated, then the parent having financial responsibility of the children should fill out the form.

When entering financial data, omit cents. For example, enter \$3495.86 as \$3495.

Use data from your last year's income tax return, or if that is not available, use the previous year's return.

Answer all questions. If the information requested is not applicable then enter none, or N/A. DO NOT leave items blank.

A-B. Parent Financially Responsible for Children(s) Education

Answer questions 1 through 8 for both the male and female parent, stepparent or guardian. Do not leave any questions blank. If natural parents are divorced or separated, be sure and answer all questions in Section 1.

C. Family Size

ITEM 9: Enter family size at home. Do not include children who have moved out of the home. Include only family members dependent on and residing with parents listed in Item A.

D. Parents' Marital Status

ITEM 10: Be sure to check appropriate box indicating parents marital status. If parents are divorced or separated, complete section 1.

E. Parents' Income Information

Report actual amounts for the previous year and estimated amounts for this past year's on lines 13-17.

ITEM 11: Check me items that fit the status

ITEM 12: Enter the total number of exemptions you claimed (or will claim) on your last year's Federal Income Tax Return.

ITEM 13 - 17: Enter previous year's totals and estimated this year's amount.

ITEM 18: Enter the total ADJUSTED GROSS INCOME as reported on IRS 1040,1040A, or 1040EZ.

ITEM 19: If family receives any income from child support, welfare (AFDC), Social Security and/or any other nontaxable source, report amount here. Enter amount per month.

F. Parents' Assets Information

ITEM 20: Enter the present combined amounts of parents cash on hand, checking accounts, and savings accounts. Do not include IRA or Keough accounts.

ITEM 21: Determine the present value of the family home and enter it here.

ITEM 22: If the family owns other real estate and/or investments, enter amounts on appropriate lines.

ITEM 23: If the family owns a business or farm enter in appropriate columns the current value and amount owed on it. If parents are not the sole owners, enter only the amount of their share of the total farm or business current market value.

G. Liabilities

ITEM 24: Enter the balance of any first or second mortgages.

ITEM 25: Enter the balance of any car loans.

ITEM 26: Enter the balance of any charge accounts.

ITEM 27: Enter the total of any medical and dental expenses not paid by insurance.

H. Student Information

Use the section to specify the number of your children attending day care, private elementary, high schools, college and trade schools.

I. Unusual Circumstances

Use the section so explain any unusual circumstances regarding your family situation.



2010/2011 Tuition Assistance Tuition Contract

Family Name: _____

The total cost to educate a child at Port Catholic for the 2010-2011 school year is \$4,400. Tuition is only one part of this cost. Educating a student is funded from three separate sources: tuition (48%), a parish subsidy (32%), and Home & School fundraisers (20%). These percentages are static, but tuition rates may slightly fluctuate each year based on enrollment and parish or non-parish membership. Port Catholic recognizes that choosing a parochial education requires a financial commitment and does its best to keep tuition costs manageable.

Students who are members of St. Mary's, St. Peter's, St. Mary/Lake Church or Immaculate Conception parishes qualify for the parish subsidy, thus reducing the family tuition rate. Rosemary School students qualify for grades beyond the parish school system. Port Catholic offers three different ways to pay student tuition. Families have the option of paying tuition in full or using FACTS, a national tuition management service that allows monthly, quarterly, or semiannual payments. Families may also pay tuition through Port Catholic's Tuition Assistance Program. To further reduce tuition families may participate in Port Catholic's SCRIP program, a national tuition reduction program that allows families to "bank" tuition money with every day purchases.

Parish members are required to provide proof of membership. If you are not currently registered and you wish to qualify for the parish subsidy, you will need to register with one of Port Catholic's affiliated parishes within 30 days from the date which you signed this contract. If this is not done, your family status will revert to non-parishioner status and be subject to non-parishioner tuition.

2010/2011 TUITION RATES

Grade Level	Parish Member Tuition	Non-Parish Member Tuition*
Pre-3	\$860	\$860
Pre-Kindergarten (K4)	Supply fee	Supply fee
Half Day Kindergarten (K5)		
First/Oldest Child	\$2,100	\$2,245
Second Child	\$2,100	\$2,245
Third Child	\$850	\$1,050
Full Day K5 – Grade 8		
First/Oldest Child	\$2,645	\$3,435
Second Child	\$2,435	\$3,235
Third Child	\$850	\$1,750
Fourth Child	No Charge	\$850

Non-Refundable Registration Fee

A non-refundable, \$100.00 registration fee per family must accompany this contract in order for your child(ren) to be considered registered. This fee is applied toward tuition. **If the \$100 registration fee is not paid, your child is not registered.** If your child(ren) is enrolled in K4 only, this fee does not apply.

Non-Parish Member Tuition*

*Non-parish member families with students in grades K5-8 will pay the parishioner tuition, plus \$800.00. This amount is the average difference between tuition and revenue received as a result of contributions to the parishes by its members. Half-day K5 tuition rates for non-parish member families is the parish member tuition plus \$150.00.

2010/2011 Tuition Payment Options & Application

ENROLLMENT POLICY

It is the policy of Port Washington Catholic School that no student will be denied the opportunity to receive an education for financial reasons. Families unable to pay tuition are assisted in applying for financial aid through our school's Tuition Assistance Program. **Port Washington Catholic School does not discriminate on the basis of race, nationality, ethnic origin, creed or the ability to meet tuition requirements.**

TUITION PAYMENT OPTIONS

1. Single Tuition Payment

All **single tuition payments** are due by **August 13, 2010**. This payment in full is made directly to the school.

2. FACTS Tuition Management Program

All or a portion of your tuition may be paid using FACTS, a national tuition management service for private and faith-based school education. The FACTS program has a flat fee of \$38.00 per family, per year, using automatic withdrawal, by invoice the fee is \$45.00 per family. There is an additional charge if paying by credit card. **There are no interest charges when using FACTS.**

3. Tuition Assistance Program

If you plan to apply for TUITION ASSISTANCE please follow the steps indicated in this packet. This process is completely confidential. **This process must be completed by Wednesday, April 28, 2010.**

A. Parish Membership Information

- We are not members of one of Port Catholic's affiliated parishes and agree to pay non-parish member tuition.
- We are not currently members of one of Port Catholic's affiliated parishes. We will be registering within 30 days.
- Yes, we are members of one of Port Catholic's affiliated parishes. Our parish membership information is below.

Your parish or envelope number appears on your church contribution envelope above your name and address. Please enter this number below as proof of parish affiliation.

Family Name

Parish

Envelope No.

B. Student Enrollment Information

I/We are requesting that my/our child(ren) be enrolled at Port Catholic School. Please indicate each student name, grade, and tuition fee for the 2010/2011 school year.

Child 1 Name/Grade _____ Tuition \$ _____

Child 2 Name/Grade _____ Tuition \$ _____

Child 3 Name/Grade _____ Tuition \$ _____

Child 4 Name/Grade _____ Tuition \$ _____

Child 5 Name/Grade _____ Tuition \$ _____

Total \$ _____

2010/2011 FACTS Payment Options/Tuition Agreement

If you are paying your tuition through the FACTS program, please complete Section A, otherwise, go directly to the Tuition Summary/Agreement: Section B.

A. FACTS Tuition Payment Options

- We will pay our **entire tuition invoice** using FACTS tuition management service using the following option/payment schedule:
- We will pay a **portion of our tuition invoice** using FACTS tuition management service and understand that the amount may not be less than \$500.00. We will be paying \$ _____ of our tuition invoice using the following payment option/schedule:

Payment Option/Schedule:

- Payment through FACTS by Automatic Bank Payment.
 - Monthly Quarterly Semiannual
 - If you selected the monthly option, please indicate: 11 or 10 payments
- Payment through FACTS by Invoice.
 - Monthly Quarterly Semiannual
 - If you selected the monthly option, please indicate: 11 or 10 payments
- Payment through FACTS by MasterCard, Discover or American Express card. *There is a "convenience fee" of \$2.50 per \$100.00 charged.*

B. Tuition Summary/Agreement

1. Past Due Tuition	\$ _____
2. Total Tuition Due for 2010/2011 School Year	\$ _____
3. Less Non-Refundable Registration Fee	\$ - 100.00
4. Family Payment by August 15th	\$ _____
5. Loan Amount	\$ _____
6. Tuition Assistance Amount	\$ _____

I/We understand that I/we must be registered members of St. Mary's, St. Peter of Alcantara, St. Mary/Lake Church, Holy Rosary or Immaculate Conception Parish within 30 days of signing this contract or tuition will revert to non-parishioner status.

Please sign and date.

Parent or Legal Guardian: _____

Spouse: _____ Date: _____

Tuition payment contract due by August 15, 2010.

Please see other side for the Port Washington Catholic School Registration Fee and Tuition Refund Policy #3240

Port Catholic School Registration Fee & Tuition Refund Policy #3240

It is the interest of the Board of Directors that registration fees are non-refundable. Tuition paid shall be refundable in the following cases:

1. If Port Washington Catholic School determines prior to the start of the school year that it cannot accommodate an enrolled student, all tuition payments made will be fully refunded.
2. If, after the start of the school year, Port Washington Catholic School determines that it cannot accommodate a student, paid tuition will be refunded on a pro-rated basis based on the number of school days the student was enrolled.
3. If prior to August 15th, a family withdraws an enrolled student(s), all tuition paid will be fully refunded. If withdrawal occurs after September 1st, 50% of tuition paid will be refunded. If withdrawal occurs after September 15th, 25% of tuition paid will be refunded. If withdrawal occurs after October 1st, no refund will be given.
4. If a family registers a child(ren) at Port Washington Catholic School and then moves out of the school district prior to the start of the school year, tuition paid will be fully refunded. If the move occurs after the start of the school year, a tuition refund will be determined on a pro-rated basis determined by the number of days the student was enrolled. Any tuition payments in excess of this amount will be fully refunded.
5. If a family registers its child(ren) for Port Washington Catholic School and applies for Tuition Assistance and is not eligible, any paid tuition will be fully refunded.

Approved 3/6/89

Amended 3/23/93

Amended 6/11/96

Amended 5/13/98

Student Financial Grant Form

A. Financially Responsible Parent

Check one.

- Father
 Mother
 Stepfather
 Stepmother
 Other (please explain in Section I)

1. Last Name _____ First Name _____ MI _____

2. Social Security No. _____ 3. Date of Birth _____

4. Street Address _____

5. City _____ State _____ Zip Code _____

6. Home Phone _____ Work/Cell Phone _____

7. Occupation/Title _____

8. Employed by _____ How Long? _____

B. Other Parent

Check one.

- Father
 Mother
 Stepfather
 Stepmother
 Other (please explain in Section I)

1. Last Name _____ First Name _____ MI _____

2. Social Security No. _____ 3. Date of Birth _____

4. Street Address _____

5. City _____ State _____ Zip Code _____

6. Home Phone _____ Work/Cell Phone _____

7. Occupation/Title _____

8. Employed by _____ How Long? _____

C. Family Size

9. Number of family members financially dependent on parent listed in Section A who will reside in the household for the current school year.

_____ Number of Parents _____ Number of Children

D. Responsible Parent's Current Marital Status

(Please check one.)

10. A. Single B. Married C. Widowed D. Divorced E. Remarried F. Separated
 G. Other _____

E. Parent's Income & Deduction

Report actual amounts for last year and estimated amounts for the current year on lines 13 – 19.

11. The following information is from:

- A. a completed tax return
 B. estimated tax return
 C. I/we did not file a tax return

12. Total number of exemptions claimed this year _____

	Actual	Estimated
13. Father	\$ _____	\$ _____
14. Mother	\$ _____	\$ _____
15. Other taxable income from interest, dividend, employment	\$ _____	\$ _____
16. Net income from business, farm, rentals	\$ _____	\$ _____
17. Alimony/Child support	\$ _____	\$ _____
18. Total adjusted gross income (IRS 1040)	\$ _____	\$ _____
19. Welfare (AFDC), Social Security or any other non-taxable source	\$ _____	\$ _____ OVER

F. Assets

20. Cash and Savings \$ _____
 21. Real Estate: Home (market value) \$ _____
 22. Other real estate or investments \$ _____
 23. Business or farm (your share only) \$ _____

G. Liabilities

24. Mortgage Holder _____ (Balance) \$ _____
 Holder _____ (Balance) \$ _____
 25. Auto Loan Holder _____ (Balance) \$ _____
 Holder _____ (Balance) \$ _____
 26. Charge Accounts:
 Name _____ (Balance) \$ _____
 Name _____ (Balance) \$ _____
 Name _____ (Balance) \$ _____
 Name _____ (Balance) \$ _____
 27. Other Debts:
 Type _____ (Balance) \$ _____
 Type _____ (Balance) \$ _____
 Type _____ (Balance) \$ _____
 Type _____ (Balance) \$ _____
Total Liabilities \$ _____

H. Student Information

List only the number of children who will be attending tuition charging school, pre-schools or day care centers next fall and cost of tuition.

	# of Children	Total Cost for All
Day Care	_____	_____
Elementary Schools	_____	_____
High Schools	_____	_____
College	_____	_____

I. Student Information

Please explain any unusual circumstances here: _____

J. Estimated Monthly Expenses

28. Mortgage/Rent \$ _____
 29. Utilities \$ _____
 30. Food \$ _____
 31. Medical/Dental \$ _____
 32. Insurance \$ _____
 33. Other _____ \$ _____
 34. Amount Available for Port Catholic Tuition \$ _____