This is a worksheet to help you prepare to fill out the TADS Financial Aid Application and WILL NOT be accepted as an application. Do not send this form to TADS or your school.

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### SECTION 6 Other Yearly Income

1. **2016 Interest & Dividends**: This value is found by adding lines 8a, 8b, and 9a on your 1040 tax return form.

2. **Yearly Workers' Compensation**

3. **Yearly Renters’ Insurance**

4. **Yearly Unemployment**
   - **Actual 2016**
   - **Estimated 2017**

5. **Miscellaneous Yearly Income**
   - **2016 Lump Sum**
   - **Recurring Yearly**

### SECTION 7 If You Pay Rent

Enter the amount you pay for rent alone; do not include utility expenses unless they are built in to your monthly rental payments.

1. **Monthly Rent**
2. **Yearly Renters’ Insurance**

### SECTION 8 Yearly Energy Expenses (renters and homeowners)

If you rent, do not include these expenses if they are already included in monthly rental payments. Homeowners should report expenses.

1. **Electricity**
2. **Gas, Oil, Coal**
3. **Water, Sewage**

### SECTION 9 Assets and Expenses – Home

Fill out this section if you are a homeowner.

1. **Year of Purchase**
2. **Purchase Price**
3. **Improvements/Additions**
4. **Current Market Value**
5. **Amount Owed on Home Loans/Mortgages**
6. **Monthly Mortgage Payment**
7. **2016 Property Tax**
8. **2016 Home Insurance**
9. **2016 Rental Income** (if not a single family dwelling)
10. **2016 Rental Expenses** (if not a single family dwelling)

### SECTION 10 Assets and Expenses – Real Estate other than Home

Fill out this section if you own any other properties in addition to your home, including rental properties, land, etc.

1. **Number of Properties**
2. **Purchase Price of all Properties**
3. **Cost of Improvements/Additions**
4. **Current Market Value**
5. **Amount Owed for all Properties**
6. **Total Monthly Loan/Mortgage Payment**
7. **2016 Gross Property Income**
8. **2016 Gross Property Expenses**

### SECTION 11 Assets and Debt – Automobiles

Please enter market value and current debt for the vehicles that you own in items 1., 2., and 3., and requested information for the vehicles that you are leasing in 4. and 5.

1. **# of Vehicles**
2. **Total Current Market Value**
3. **Total Debt**
4. **# of Vehicles**
5. **Total Monthly Lease**
6. **Yearly Insurance Cost for All Vehicles**

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## Financial Aid Application Worksheet

**2017-2018 School Year**

### SECTION 12 Assets – Recreational Vehicles/Boats

1. **Value**: Include market value for all recreational vehicles that you own. A few examples of recreational vehicles are: Motor homes, boats, motorcycles, all terrain vehicles, personal watercrafts, snowmobiles and dune buggies.

2. **Debt**: Please list amount you owe for all of the recreational vehicles that you own.

### SECTION 13 Assets – Cash, Stocks, etc.

1. **Value**: Include market value for all checking, savings, cash, CD’s, stocks, securities, bonds, mutual funds.

2. **Debt**: Please list amount you owe for all checking, savings, cash, CD’s, stocks, securities, bonds, mutual funds.

### SECTION 14 Assets – Retirement Plans

1. **2016 Contribution – Household**: Enter the total amount that Parents/Guardians contributed towards these funds during 2016. If year 2016 contributions are still pending, please estimate total.

2. **2016 Contribution – Employer**: Enter the total amount that employers of Parents/Guardians contributed toward these funds during 2016. If year 2016 contributions are still pending, please estimate total.

3. **Current Total Value**: Enter the total amount that these funds are worth. This value is not just the sum of 1. and 2., but rather the total worth of the funds from a recent statement. If year 2016 contributions are still pending, please estimate total.

### SECTION 15 Medical Expenses

1. **Medical/Dental**

2. **Prescription Drugs**: List only out-of-pocket expenses that will not be, or have not been covered by insurance. Include co-pay amounts here.

3. **Prescription Eyewear**: List the corresponding amounts here. Please list the total amount you pay in a year.

### SECTION 16 Alimony and Child Support Payments

1. **2016 Payments to Others in 2016**

2. **Estimated Support Payments in 2017**

3. **2017 Payments to Others in 2017**

4. **Estimated Alimony Payments in 2017**

### SECTION 17 Day Care and/or Elderly Care Expenses (include summer camp expenses)

Do not include pre-kindergarten, as this is considered a school expense which should be listed in Section 22.

1. **Dependent Name**

2. **2016 Payments**

3. **Estimated 2017 Payments**

### SECTION 18 Charitable Giving (List your three largest contributions)

If you made tax deductible donations to non-profit organizations in 2016, list the three organizations you donated the most to and the amount of those donations.

1. **Charity Name**

2. **2016 Contributions**

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SECTION 21 Contributions to Education (2017–2018)

1. How much (in your opinion) can Parent(s)/Guardian(s) contribute toward the tuition of all dependents in this household next year?

2. How much per year is a non-custodial parent ordered by law to contribute toward the education of those applying for financial aid with this form?

3. How much will any other sources contribute toward the education of those applying for financial aid with this form?

SECTION 22 List all Dependents in the Household; do not include Parent(s)/Guardian(s)

If you have more than five dependents, please see your financial aid administrator for the appropriate addendum forms. Definition of "Dependent": Any child that you can claim on your 1040 tax form is a dependent. In addition, any child who is living in your household for six months or more per year and who is under age 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.

7. Dependent Earnings in 2016: If a dependent held a job in 2016, list the earnings in this section. Do not list Social Security income or earnings from stocks, securities, etc.

8. Dependent Current Savings: Do not include 529 College Savings Plans in this figure.

9. Amount Dependent can contribute to education from earnings/savings for school year 2017–18

10. Expenses – Bus, Books, Uniforms, etc.: Include expenses that the school requires you to pay outside of tuition costs. Do not include optional expenses such as fees to play sports or fees for other extracurricular activities, or expenses such as lunch or gas.

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When you are ready to fill out an online application, go to www.mytads.com, click on ‘Financial Aid’ and follow directions.

Contact TADS

Online Chat, E-mail, Telephone or Fax:
We are available to assist you with questions in filling out your application or to check the status of your application through the following:

Online Chat: Go to http://www.mytads.com and click on the icon for live help. You will be connected to a TADS representative.

E-mail: support@tads.com

Toll-free: 1.800.477.8237 We are available Monday through Friday, 8:00 a.m. to 8:00 p.m. Central Time.

Telephone: 612.548.3320 We are available Monday through Friday, 8:00 a.m. to 8:00 p.m. Central Time.

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