



## 2020 Financial Aid Application for Summer Programs

- Choate Rosemary Hall seeks the best qualified candidates from a variety of backgrounds and offers need-based financial aid to students with strong academic performance and potential.
- Because of limited funds, **Financial Aid is primarily available only for on-campus programs and to US residents filing IRS Income Tax Returns.**

Financial Aid can help cover on-campus program fees (tuition, meals, housing, books, field trips), but does **not** cover travel expenses, health insurance, or test prep courses.

Please note that priority in awarding of aid is given to qualified first-time applicants, and that receiving aid for one summer does not guarantee additional funding for subsequent summers.

- **Financial Aid applications must include copies of completed 2018 1040 IRS tax forms, W2 forms, and supporting documents for all custodial and non-custodial parents or guardians. If families have filed 2019 taxes by our February 14<sup>th</sup> deadline, they are welcome to submit 2019 IRS tax forms and 2019 W2s instead.**

**Please note that current Choate students and students who are applicants to Choate for the academic year must still comply with the Summer Programs financial aid process if interested in being considered for aid for Summer Programs.** The Summer Programs Financial Aid application needs to be submitted to Choate Summer Programs, along with all the required tax forms and supporting documents for custodial and non-custodial parents.

- **The priority deadline to submit the completed financial aid application and copies of filed IRS tax materials for all custodial and non-custodial parents or guardians is February 14, 2020.**

**The Financial Aid application and accompanying tax documents can be submitted via email to [choatesummer@choate.edu](mailto:choatesummer@choate.edu), FAX to 203-697-2519, or mail to**

Choate Summer Programs  
333 Christian Street  
Wallingford, CT 06492

**Students will not be considered for Financial Aid until both the Summer Programs Financial Aid application and all IRS supporting documents have been received.**

If you have any questions as you are filling out the forms, please feel free to call us.

Susan P. Farrell  
Director of Admission  
Associate Director of Summer Programs



**ASSETS** (other than home property): **Note current value**

Parent/Guardian Stocks	\$ _____	Rental Property Income	\$ _____
Parent/Guardian Bonds	\$ _____	Social Security Income	\$ _____
Parent/Guardian Mutual Funds	\$ _____	Pension Income	\$ _____
Value of Business or Farm	\$ _____	Nontaxable Income & Benefits	\$ _____
Student's Stocks	\$ _____		
Student's Bonds	\$ _____		
Student's Mutual Funds	\$ _____		

Does student have additional income not listed above?  Yes  No  
 If yes, please enumerate listing nature of asset, how obtained and value.

**PROPERTY INFORMATION**

Do you have a mortgage on your **primary** residence?

Yes  No **If yes,**

Year purchased \_\_\_\_\_

Purchase price \$ \_\_\_\_\_

Present market value \$ \_\_\_\_\_

Amount of mortgage \$ \_\_\_\_\_

Monthly mortgage payment \$ \_\_\_\_\_

Years left on mortgage \_\_\_\_\_

Do you have a mortgage on a **second** home?

Yes  No **If yes,**

Year purchased \_\_\_\_\_

Purchase price \$ \_\_\_\_\_

Present market value \$ \_\_\_\_\_

Amount of mortgage \$ \_\_\_\_\_

Monthly mortgage payment \$ \_\_\_\_\_

Years left on mortgage \_\_\_\_\_

Do you own a  business  farm? **If yes,** what percent of ownership? \_\_\_\_\_ %

Net profit/loss from business or farm: \$ \_\_\_\_\_

Monthly Rent Paid Out (if applicable) \$ \_\_\_\_\_

**EDUCATIONAL & EXTRACURRICULAR EXPENSES** (please include applicant and all additional family members)

Name & Age	School	Tuition	Financial Aid Award
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total cost of camps, activities, teams, etc. in 2019: \$ \_\_\_\_\_ Total cost of vacations in 2019: \$ \_\_\_\_\_

