



Choate Summer Programs 2021 Financial Aid Information

- 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 only available for US residents filing IRS Income Tax Returns. The deadline for priority consideration for aid is February 12, 2021.**

Financial Aid can help cover fees for academic classes and programs, but is not available for 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 2020 or 2019 1040 IRS tax forms, 2020 W2 forms, and supporting documents for all custodial and non-custodial parents or guardians.
Please remember to redact social security numbers from all IRS tax documents.

Current Choate students and students applying 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, along with all the required tax forms and supporting documents for custodial and non-custodial parents.

- Applicants whose admission and aid materials are complete on or before the priority deadline will receive their decision soon after February 12. Applicants whose materials become complete after February 12 will receive their decision on a rolling basis as materials are reviewed.

The Financial Aid application should be completed and uploaded to the Summer Programs Admission Portal, along with accompanying tax documents. 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 or need additional help with the financial aid application process, please contact our office.

Susan P. Farrell
Interim Director
Choate Summer Programs



STUDENT INFORMATION

Student's full name: _____
last (family)
first
middle

Date of birth (mm/dd/year) ____/____/____
 Male
 Female
 Self Identify

**Program and/or Courses student is most interested in
(please specify):**

Applicant lives with: parents mother father other (name & relationship): _____

PARENT/GUARDIAN INFORMATION

Name: _____

Parent 1 Step-parent 1 Guardian 1

Name: _____

Parent 2 Step-parent 2 Guardian 2

Home/Permanent Address:

Home/Permanent Address, **if different:**

Employer & Occupation _____

Years with employer ____ full time part-time

Employer & Occupation _____

Years with employer ____ full time part-time

FILING OF IRS TAXES

YES, I/we file tax forms with the IRS.

Please submit copies of 2020 W2 forms and *all* IRS forms filed for 2019 or 2020..

NO, I/we do not file tax forms with the IRS. Please explain why tax forms are not filed:

PARENT/GUARDIAN 2020 INCOME INFORMATION (enter yearly amounts)

Salary and wages for parent/guardian (s) \$ _____

Dividend and/or interest income \$ _____

Alimony received \$ _____

Child support \$ _____

Social Security/Pension Income \$ _____

Rental Property Income \$ _____

Nontaxable Income & Benefits \$ _____

Other \$ _____

Explain:

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 2020: \$ _____ Total cost of vacations in 2020: \$ _____

