



### **Choate Summer Programs 2023 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 14, 2023.**

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 2022 or 2021 1040 IRS tax forms, 2022 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 14, 2023. Applicants whose materials become complete after February 14 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.



**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 below):**

\_\_\_\_\_

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 2022 W2 forms and *all* IRS forms filed for 2021 or 2022.

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

**PARENT/GUARDIAN 2022 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 2022: \$ \_\_\_\_\_ Total cost of vacations in 2022: \$ \_\_\_\_\_

**RESOURCES AVAILABLE FOR CHOATE SUMMER PROGRAMS**

*It is expected that custodial and non-custodial parents or guardians will contribute what they can to meeting the cost of the program. How much do you think will be available from each source to help cover the fee for participating in Choate Summer Programs? Please do not leave blank.*

From custodial parent/guardian income \$ \_\_\_\_\_  
 From non-custodial parent/guardian income \$ \_\_\_\_\_  
 From friends or relatives \$ \_\_\_\_\_  
 From other sources \$ \_\_\_\_\_  
 Specify source(s): \_\_\_\_\_  
 TOTAL FUNDS available for Summer Programs Fee: \$ \_\_\_\_\_

**INDEBTEDNESS** (include parental student loans, credit card debt, car loan, etc.) Please enumerate.

Please use an additional sheet of paper if you wish to comment on any special circumstance(s) affecting your financial resources.

***Thank you for filling out our Financial Aid application. We appreciate your sharing your family's situation with us as honestly as possible, and we will treat all information with confidentiality.***

**SIGNATURES OF CUSTODIAL PARENTS/GUARDIANS**

	<i>Date</i>
	<i>Date</i>

