MEDFORD BEFORE/AFTER SCHOOL PROGRAMS
Application for Financial Assistance

PLEASE PRINT CLEARLY Application Date: ____/____/____

1. STUDENT INFORMATION

Student's Name _____

School: Brooks McGlynn Missituk Roberts

2. FAMILY / HOUSEHOLD INFORMATION

Caregiver #1

Living in the same household as student? ☐Yes ☐No

Name _____ Relationship to Student _____

Cell # _____ Email _____

Income Type	Monthly Amt.	Copy Provided?	Income Type	Monthly Amt.	Copy Provided?
Wages, Salaries and Tips	$	Y N 4 consecutive paystubs	Social Security Compensation	$	Y N
Unemployment Compensations	$	Y N	Child Support	$	Y N
Disability Income	$	Y N	Retirement Income	$	Y N
Food Stamps	$	Y N	Alimony	$	Y N
Housing Allowance	$	Y N	Other Government Payments or Stipends	$	Y N

Please provide the most recent IRS1040

Caregiver #2

Living in the same household as student? ☐Yes ☐No

Name _____ Relationship to Student _____

Cell # _____ Email _____

Income Type	Monthly Amt.	Copy Provided?	Income Type	Monthly Amt.	Copy Provided?
Wages, Salaries and Tips	$	Y N 4 consecutive pay stubs	Social Security Compensation	$	Y N
Unemployment Compensations	$	Y N	Child Support	$	Y N
Disability Income	$	Y N	Retirement Income	$	Y N
Food Stamps	$	Y N	Alimony	$	Y N
Housing Allowance	$	Y N	Other Government Payments or Stipends	$	Y N

Please provide the most recent IRS1040

Other Adults in Household

Name	Relationship

Other Children in Household

List names and ages of siblings, oldest to youngest.

Name:	Date of birth:	Age in years:	Name of school attending

I verify all of the above information is accurate:

_____ _____

Signature Print name

Please return this form with all verifying income documentation including:
Page one from your US 1040 Income Tax Form, 4 consecutive pay stubs for each working parent, and any other relevant financial documentation to:

Medford Public
Schools Before/After
School Office 489
Winthrop Street
Medford, MA 02155
781-393-2211
before-afterschool@medford.k12.ma.us

A decision will be reached on your financial assistance within 10 business days after receiving all necessary qualifying information.

Documentation verified by _____ *on* ___/____/____

SELF-DECLARATION OF INCOME REPORT

Community Development Block Grant – City of Medford

(Income limits effective June 1, 2025)

Federal regulations require us to obtain this information to document assistance is being provided to low and moderate-income families and households (as applicable based on the activity). The Participant/Guardian should complete this form indicating all persons residing within their household or family. The Grantee should retain this form for reporting requirements as well as for on-site monitoring visits.

INFORMATION PROVIDED ON THIS FORM IS KEPT CONFIDENTIAL AND IS NOT SHARED WITH ANY OTHER AGENCIES

Agency: _____

Please circle the income level for your family or household based on the total number of persons in your family or household. Please see the attached Income Guidelines for details on when to use Household Income or Family Income.

Income Level	Household/Family Size (Number of People)							
	1	2	3	4	5	6	7	8
Extremely Low Income (30%)	$34,750	$39,700	$44,650	$49,600	$53,600	$57,550	$61,550	$65,500
Very Low Income (50%)	$57,900	$66,200	$74,450	$82,700	$89,350	$95,950	$102,550	$109,200
Low Income (80%)	$92,650	$105,850	$119,100	$132,300	$142,900	$153,500	$164,100	$174,650
Over Income Limits	$92,651+	$105,851+	$119,101+	$132,301+	$142,901+	$153,501+	$164,101+	$174,651+

Activity type income is based on (please check one): Household Income _____ Family Income _____

Gender of head of household (please write in): _____

Age of head of household: ____ check if over 62 years of age

Nationality:

____ White or Caucasian (Non-Latino)
____ American Indian/Alaska Native & White
____ American Indian or Alaska Native
____ Hawaiian Native/Other Pacific Islander
____ Other multi-racial
____ Black, African-American, Other African (Non-Latino)
____ Asian, Asian-American
____ Asian & White
____ American Indian/Alaska Native & Black/African American

Ethnicity:

Hispanic (yes or no) _____

Income Verification:

I certify that this information is complete and accurate. I agree to provide, upon request, documentation on all income sources to the HUD Grantee/Program Administrator.

Signature: _____ Date: _____

Print Name: _____

Home Address: _____

_____

INCOME GUIDELINES

Household Income: Applies to all activities involving the acquisition, construction, rehabilitation or improvement of property for housing. Household Income is based on all adults, whether they are related or not, who are 18 years or older living in a single residence.

Family Income: Applies to all activities other than the housing activities described above. A family includes all persons living in the same household who are related by birth, marriage, or adoption. Family Income is based on all adults 18 years or older in one family living in a single residence.

Inclusions in Income:

(1) The full amount, before any payroll deductions, of wages and salaries, overtime pay, commissions, fees, tips and bonuses, and other compensation for personal services;

(2) The net income from operation of a business or profession. Expenditures for business expansion or amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation of assets used in a business or profession may be deducted, based on straight line depreciation, as provided in Internal Revenue Service regulations. Any withdrawal of cash or assets from the operation of a business or profession will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested in the operation by the family;

(3) Interest, dividends, and other net income of any kind from real or personal property. Expenditures for amortization of capital indebtedness shall not be used as deductions in determining net income. An allowance for depreciation is permitted only as authorized in paragraph (2) above. Any withdrawal of cash or assets from an investment will be included in income, except to the extent the withdrawal is reimbursement of cash or assets invested by the family. Where the family has net family assets in excess of $5,000, annual income shall include the greater of the actual income derived from all net family assets or a percentage of the value of such assets based on the current passbook savings rate, as determined by HUD;

(4) The full amount of periodic amounts received from social security, annuities, insurance policies, retirement funds, pensions, disability or death benefits, and other similar types of periodic receipts, including a lump-sum amount or prospective monthly amounts for the delayed start of a periodic amount (e.g., Black Lung Sick benefits, Veterans Disability, Dependent Indemnity Compensation, payments to the widow of a serviceman killed in action). See paragraph (13) under Income Exclusions for an exception to this paragraph;

(5) Payments in lieu of earnings, such as unemployment, disability compensation, worker's compensation, and severance pay, except as provided in paragraph (3) under Income Exclusions;

(6) Welfare Assistance. (a) Welfare assistance received by the family. (b) If the welfare assistance payment includes an amount specifically designated for shelter and utilities that is subject to adjustment by the welfare assistance agency in accordance with the actual cost of shelter and utilities, the amount of welfare assistance income to be included as income shall consist of: (c) The amount of the allowance or grant exclusive of the amount specifically designated for shelter or utilities; plus (d) The maximum amount that the welfare assistance agency could in fact allow the family for shelter and utilities. If the family's welfare assistance is ratably reduced from the standard of need by applying a percentage, the amount calculated under this paragraph shall be the amount resulting from one application of the percentage.

(7) Periodic and determinable allowances, such as alimony and child support payments, and regular contributions or gifts received from organizations or from persons not residing in the dwelling;

(8) All regular pay, special pay, and allowances of a member of the Armed Forces, except as provided in paragraph (7) under Income Exclusions.

(9) For Section 8 programs only and as provided in 24 CFR 5.612, any financial assistance, in excess of amounts received for tuition, that an individual receives under the Higher Education Act of 1965 (20 U.S.C. 1001 et seq.), from private sources, or from an institution of higher education (as defined under the Higher Education Act of 1965 (20 U.S.C. 1002)), shall be considered income to that individual, except that financial assistance described in this paragraph is not considered annual income for persons over the age of 23 with dependent children. For purposes of this paragraph "financial assistance" does not include loan proceeds for the purpose of determining income. (Note: This paragraph also does not apply to a student who is living with his/her parents who are applying for or receiving Section 8 assistance.); and

(10) Other income, except as indicated below.

Exclusions from Annual Income – Optional:

(1) Income from employment of children (including foster children) under the age of 18 years;

(2) Payments received for the care of foster children or foster adults (usually persons with disabilities unrelated to the tenant family, who are unable to live alone);

(3) Lump-sum additions to family assets, such as inheritances, insurance payments (including payments under health and accident insurance and worker's compensation), capital gains, and settlement for personal or property losses, except as provided in

paragraph (5) under Income Inclusions;

(4) Amounts received by the family that are specifically for, or in reimbursement of, the cost of medical expenses for any family member;

(5) Income of a live-in aide, as defined in 24 CFR 5.403;

(6) The full amount of student financial assistance paid directly to the student or to the educational institution (see Income Inclusions (9), above, for students receiving Section 8 assistance);

(7) The special pay to a family member serving in the Armed Forces who is exposed to hostile fire (e.g., in the past, special pay included Operation Desert Storm);

(8) (a) Amounts received under training programs funded by HUD (e.g., training received under Section 3); (b) Amounts received by a person with a disability that are disregarded for a limited time for purposes of supplemental security income eligibility and benefits because they are set aside for use under a Plan to Attain Self-Sufficiency (PASS); (c) Amounts received by a participant in other publicly assisted programs that are specifically for or in reimbursement of out-of-pocket expenses incurred (special equipment, clothing, transportation, childcare, etc.) and which are made solely to allow participation in a specific program; (d) Amounts received under a resident service stipend. A resident service stipend is a modest amount (not to exceed $200 per month) received by a resident for performing a service for the owner, on a part-time basis, that enhances the quality of life in the project. Such services may include, but are not limited to, fire patrol, hall monitoring, lawn maintenance, and resident-initiative coordination. No resident may receive more than one such stipend during the same period of time; or (e) Incremental earnings and benefits resulting to any family member from participation in qualifying state or local employment training programs (including training programs not affiliated with a local government) and training of a family member as a resident management staff person. Amounts excluded by this provision must be received under employment training programs with clearly defined goals and objectives and are excluded only for the period during which the family member participates in the employment training program.

(9) Temporary, nonrecurring, or sporadic income (including gifts);

(10) Reparation payments paid by a foreign government pursuant to claims filed under the laws of that government by persons who were persecuted during the Nazi era. (Examples include payments by the German and Japanese governments for atrocities committed during the Nazi era);

(11) Earnings in excess of $480 for each full-time student 18 years or older (excluding the head of household and spouse);

(12) Adoption assistance payments in excess of $480 per adopted child;

(13) Deferred periodic amounts from supplemental security income and social security benefits that are received in a lump-sum amount or in prospective monthly amounts;

(14) Amounts received by the family in the form of refunds or rebates under state or local law for property taxes paid on the dwelling unit;

(15) Amounts paid by a state agency to a family with a member who has a developmental disability and is living at home to offset the cost of services and equipment needed to keep the developmentally disabled family member at home; or

(16) Amounts specifically excluded by any other federal statute from consideration as income for purposes of determining eligibility or benefits under a category of assistance programs that includes assistance under any program to which the exclusions set forth in 24 CFR 5.609(c) apply. A notice will be published in the Federal Register and distributed to housing owners identifying the benefits that qualify for this exclusion. Updates will be published and distributed when necessary.
See https://files.hudexchange.info/resources/documents/HUD_P5_Inclusions_Exclusions.pdf for details on income sources that qualify for that exclusion

Verification of Annual Income

(1) Annual Income should be supported with documentation from the income source. A representative sample of all job classifications should be income verified. Income verification should be obtained prior to job placement. Determining the job holder's income level will ensure that Targeted Income Group benefit is measured. **A minimum of 70% of clientele should be under 80% AMI.**

(2) Maintenance of income verification records must be accessible for CDBG program review. Organize income verification records by each loan or funded activity.