



# THE RIVERS SCHOOL

## Summer Courses Financial Aid Application

### **POLICY AND PROCEDURES**

The Rivers School awards financial aid on the basis of need. Awards are contingent upon the thorough and prompt completion of the financial aid application process. Please note that failure to complete the following steps below can jeopardize a student's potential to receive financial aid.

Decisions are made by a standing committee comprised of the Director of Summer Programs, the Director of Finance & Operations (or his designee), and representatives of the faculty. To ensure equitable distribution of funds, all applicants must fill out the attached application completely and provide copies of the required supporting documents. Feel free to provide supplemental information for any sections that require special explanations. Incomplete or inaccurate applications will jeopardize accurate and adequate distribution of funds.

Complete the enclosed Financial Aid Request Form by **July 15, 2024** and send to:

**The Rivers School**  
**c/o Tom Bourdeau, Director of Operations**  
**333 Winter Street, Weston, MA 02493**

### **DECISION MAKING POLICY**

The Rivers School Summer Programs Financial Aid Committee will make a decision provided all questions are answered completely. Financial Aid decisions are made only when we have a completed financial aid request form and a copy of your most recent 1040 form.

### 1. STUDENT APPLICANT INFORMATION

- A. Student's name: \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
 Male       Female       Unspecified
- B. Home address: \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_
- Student lives with:       Father       Stepfather       Male Guardian  
 Mother       Stepmother       Female Guardian
- C. Summer Course(s): \_\_\_\_\_  
\_\_\_\_\_

### 2. GUARDIAN INFORMATION

- A. Guardian Name (1) \_\_\_\_\_  
Home Address \_\_\_\_\_  
Occupation/Employer \_\_\_\_\_  
Preferred Phone \_\_\_\_\_ Email \_\_\_\_\_
- B. Guardian Name (2) \_\_\_\_\_  
Home Address \_\_\_\_\_  
Occupation/Employer \_\_\_\_\_  
Preferred Phone \_\_\_\_\_ Email \_\_\_\_\_

### 3. TAX INFORMATION

- A. The information on this form is from a tax return that is:       Completed       Estimated
- B. Income Tax Filing Status (last year filed):       Single       Married, joint return  
 Married, filing separately       Head of household  
 Did not file
- C. Did the student applicant(s) file a federal tax return for the previous year?       Yes       No
- D. How many federal income tax exemptions did you or will you claim for the previous year? \_\_\_\_\_
- E. How many children, including the student applicant(s) are residing in your home and/or receiving support from you in the previous year? \_\_\_\_\_
- F. How many children entered in item E will be attending full-time childcare, tuition-charging preschools, schools, or colleges in the upcoming year? \_\_\_\_\_

**4. PARENT'S ANNUAL INCOME AND EXPENSE**

**Last Year Filed**

**Current Year (est.)**

**A. Total Taxable Income Before Deductions**

Salaries and wages for Guardian 1

\_\_\_\_\_

\_\_\_\_\_

Salaries and wages for Guardian 2

\_\_\_\_\_

\_\_\_\_\_

Dividend and/or interest income

\_\_\_\_\_

\_\_\_\_\_

Alimony received

\_\_\_\_\_

\_\_\_\_\_

**B. Total Nontaxable Income**

Child Support received for all children

\_\_\_\_\_

\_\_\_\_\_

Social Security benefits for entire family

\_\_\_\_\_

\_\_\_\_\_

Other nontaxable income

\_\_\_\_\_

\_\_\_\_\_

**C. Total income (A + B)**

\_\_\_\_\_

\_\_\_\_\_

**D. IRS total itemized deductions from IRS Schedule A**

\_\_\_\_\_

\_\_\_\_\_

**E. Self-employment tax paid**

\_\_\_\_\_

\_\_\_\_\_

**F. Total medical/dental expenses (not reimbursed by insurance)**

\_\_\_\_\_

\_\_\_\_\_

**G. Unusual expenses**

\_\_\_\_\_

\_\_\_\_\_

**H. Total Expenses (add D through G)**

\_\_\_\_\_

\_\_\_\_\_

**5. ASSETS**

**A. Approximate appraised house value**

\_\_\_\_\_

**B. Outstanding mortgage balance**

\_\_\_\_\_

**C. Net home equity**

\_\_\_\_\_

**D. Other real estate**

\_\_\_\_\_

**E. Cash, savings and investments**

\_\_\_\_\_

**F. Automobile(s)**

1. Year \_\_\_\_\_ Model \_\_\_\_\_

3. Year \_\_\_\_\_ Model \_\_\_\_\_

2. Year \_\_\_\_\_ Model \_\_\_\_\_

4. Year \_\_\_\_\_ Model \_\_\_\_\_

**G. How much did you pay for camps for the current year**

\_\_\_\_\_

How much do you plan to pay for camps for the year for which the student is applying

\_\_\_\_\_

**H. How much did you pay for vacations for the current year**

\_\_\_\_\_

How much do you plan to pay for vacations for the year for which the student is applying

\_\_\_\_\_

**7. PARENT'S CERTIFICATION AND AUTHORIZATION**

We declare that the information reported on this form, to the best of our knowledge and belief, is true, correct, and complete.

Signature of Guardian 1 \_\_\_\_\_

Date \_\_\_\_\_

Signature of Guardian 2 \_\_\_\_\_

Date \_\_\_\_\_

**PLEASE INCLUDE A COPY OF YOUR MOST RECENT TAX RETURN.**