This is a worksheet to help you prepare to fill out the TADS Financial Aid Application and WILL NOT be accepted as an application.

You will need the following supporting documentation before you begin:

- Most recently filed federal taxes
- Most Recent W-2’s received by all Parents/Guardians listed on application
- Recent pay stubs of jobs that Parents/Guardians currently hold
- All documentation that establishes how much miscellaneous monthly or yearly income you currently receive (i.e. welfare, food stamps, unemployment, workers’ compensation)
- All corporate, partnership and trust tax forms, if a Parent/Guardian owns 20% or more interest in a corporation or partnership or if any member of the household owns 20% or more interest in a trust
- Other documentation (recent utility bills, daycare expense, etc.) may be required

**SECTION 3** List all jobs held by Parent(s)/Guardian(s) since January 1, 2016, even if no longer at this job

If Parents/Guardians have held more than four jobs since January 1, 2016, please see your financial aid administrator for an addendum.

If a Parent/Guardian only received a Form 1099, enter that in Section 4.

1. 2016 Wages, Tips, Other Compensation: This value can be found in Box 1 of your 2016 W-2. If you do not have your 2016 W-2 yet, use the year-to-date total off of your last December 2016 paycheck. You may fax the W-2 in later as long as it is before the application deadline.
2. Employer
3. 2016 Wages, Tips, Other Compensation
4. 2016 Wages, Tips, Other Compensation
5. 2017 Estimated Wages, Tips, Other Compensation for this job: If you estimate that your 2017 income from a job will be lower than 2016 income, please attach an explanation of why you believe that will happen.

**SECTION 4** List Business, Farm, Corporation, Partnership, Trust and Miscellaneous Income since January 1, 2016

Complete this section even if the business recently closed, or has just opened. Find your relevant tax form below and enter the corresponding line number values for each field on the application. For example: If you filed Form 1065 because you are involved in a Partnership, you should find ‘Partnership - Form 1065’ in the section below. You will then notice that there are two numbers, 5. and 6. Listed after each number is the action you need to take for that item. Continuing with the Partnership example, you would look at 5. and notice that it says ‘Line 22’. Find Line 22 on the Partnership Form 1065 and enter that number into 5. 2016 Actual Net Profit on this application. You are required to submit all tax documentation, profit and loss statements and balance sheets along with your application.

**Group 1: No additional fee is required if you submitted tax documentation to the federal government for the following group:**

- Miscellaneous Income - Form 1099: 5. Line 7, 6. Leave blank
- Profit/Loss from Business - Schedule C: 5. Line 31, 6. Line 13
- Profit/Loss from Business - Schedule C-EZ: 5. Line 3, 6. Leave blank
- Profit/Loss from Farm - Schedule F: 5. Line 34, 6. Line 14
- Estates and Trusts - Form 1041: 5. Line 22, 6. Leave blank
- Partnership - Form 1065: 5. Line 22, 6. Line 16

**Group 2: An additional processing fee is required if you submitted tax documentation to the federal government for the following group (See School Directions for fee information):**

- Corporation (Short Form) - Form 1120-A: 5. Line 26, 6. Line 20c
- Corporation - Form 1120: 5. Line 30, 6. Line 20
- S Corporation - Form 1120S: 5. Line 21, 6. Line 14c

**SECTION 5** Other Monthly Income

1. Welfare Income
2. Food Stamps
3. Parent(s)/Guardian(s)
4. Dependents under 19
5. Elderly Dependents
6. Child Support
7. Alimony
8. Taxable
9. Non-Taxable

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## SECTION 12 Assets – Recreational Vehicles/Boats

1. **Value**: Include market value for all recreational vehicles that you own. A few examples of recreational vehicles are: Motor homes, boats, motorcycles, all terrain vehicles, personal watercrafts, snowmobiles and dune buggies.

2. **Debt**: Please list amount you owe for all of the recreational vehicles that you own.

## SECTION 13 Assets – Cash, Stocks, etc.

1. **Checking, Savings, Cash, CD’s**: List current value of these accounts, along with cash on hand.

2. **Stocks, Securities, Bonds, Mutual Funds**: List current value of these accounts.

## SECTION 14 Assets – Retirement Plans

1. **2016 Contribution – Household**: Enter the total amount that Parents/Guardians contributed towards these funds during 2016. If year 2016 contributions are still pending, please estimate total.

2. **2016 Contribution – Employer**: Enter the total amount that employers of Parents/Guardians contributed toward these funds during 2016. If year 2016 contributions are still pending, please estimate total.

3. **Current Total Value**: Enter the total amount that these funds are worth. This value is not just the sum of 1. and 2., but rather the total worth of the funds from a recent statement. If year 2016 contributions are still pending, please estimate total.

## SECTION 15 Medical Expenses

1. **Payments Made in 2016**
   - Medical/Dental
   - Prescription Drugs
   - Prescription Eyewear

2. **Current Medical Debt**
   - Medical/Dental
   - Prescription Drugs
   - Prescription Eyewear

3. **Annual Insurance Premiums**
   - Medical/Dental
   - Prescription Drugs
   - Prescription Eyewear

## SECTION 16 Alimony and Child Support Payments

2. **Child Support Paid to Others in 2016**

3. **Estimated Support Payments in 2017**

4. **Alimony Paid to Others in 2016**

5. **Estimated Alimony Payments in 2017**

## SECTION 17 Day Care and/or Elderly Care Expenses (include summer camp expenses)

Do not include pre-kindergarten, as this is considered a school expense which should be listed in Section 22.

1. **Dependent Name**

2. **2016 Payments**

3. **Estimated 2017 Payments**

## SECTION 18 Charitable Giving (List your three largest contributions)

If you made tax deductible donations to non-profit organizations in 2016, list the three organizations you donated the most to and the amount of those donations.

1. **Charity Name**

4. **2016 Contributions**

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SECTION 21 Contributions to Education (2017–2018)

1. How much (in your opinion) can Parent(s)/Guardian(s) contribute toward the tuition of all dependents in this household next year?

2. How much per year is a non-custodial parent ordered by law to contribute toward the education of those applying for financial aid with this form?

3. How much will any other sources contribute toward the education of those applying for financial aid with this form?

SECTION 22 List Dependents in the Household; do not include Parent(s)/Guardian(s)

If you have more than five dependents, please see your financial aid administrator for the appropriate addendum forms. Definition of “Dependent”: Any child that you can claim on your 1040 tax form is a dependent. In addition, any child who is living in your household for six months or more per year and who is under age 18 qualifies as a dependent. If you are a non-custodial parent, all children applying for financial aid should be listed as dependents, even if not living in your household and not on your taxes. Do not list Parents/Guardians in this section.

Dependent Number       Dependent Earnings in 2016       Dependent Current Savings       Amount Dependent can contribute to education from earnings/savings for school year 2017–18

#1                       
#2                       
#3                       
#4                       
#5                       

SECTION 23 List all Dependents in the Household; do not include Parent(s)/Guardian(s)

If you have more than five dependents, please see your financial aid administrator for the appropriate addendum forms. Definition of “Dependent”: Any child that you can claim on your 1040 tax form is a dependent. In addition, any child who is living in your household for six months or more per year and who is under age 18 qualifies as a dependent. If you are a non-custodial parent, all children applying for financial aid should be listed as dependents, even if not living in your household and not on your taxes. Do not list Parents/Guardians in this section.

Dependent Number       Dependent Earnings in 2016       Dependent Current Savings       Amount Dependent can contribute to education from earnings/savings for school year 2017–18

#1                       
#2                       
#3                       
#4                       
#5                       

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When you are ready to fill out an online application, go to www.mytads.com, click on ‘Financial Aid’ and follow directions.

Contact TADS

Online Chat, E-mail, Telephone or Fax:
We are available to assist you with questions in filling out your application or to check the status of your application through the following:

Online Chat: Go to http://www.mytads.com and click on the icon for live help. You will be connected to a TADS representative.
E-mail: support@tads.com
Toll-free: 1.800.477.8237 We are available Monday through Friday, 8:00 a.m. to 8:00 p.m. Central Time.
Telephone: 612.548.3320 We are available Monday through Friday, 8:00 a.m. to 8:00 p.m. Central Time.
Fax Number: 612.548.3326

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