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EXETER SUMMER
Phillips Exeter Academy

FINANCIAL AID QUESTIONNAIRE

This form must be filled out by all parents/guardians listed on the application form. Please print/type all information.

_____ is applying for financial aid for Exeter Summer.
(Applicant's full legal name)

Please return this completed Financial Aid Questionnaire along with a copy of the following forms: your **2017 or 2018 IRS 1040, including all forms and schedules**, supporting **W-2 forms**, and/or **1099 forms** (from the same year as the IRS 1040 form). If you have either a partnership or an S Corporation listed on Schedule E of your return, please submit the corresponding K-1's and forms 1065 or 1120S for either the partnership or the S Corporation. **We require the above forms from all parents/guardians who are listed on the application form.** *Additional forms may be used if necessary.* The Admissions Committee will not consider a candidate's financial aid application unless financial aid materials and all EXETER SUMMER application materials are received by February 15, 2019.

Financial assistance in the form of scholarships is awarded by EXETER SUMMER according to demonstrated need and academic credentials of the applicant. The information supplied on this questionnaire and on the supporting documentation will enable us to establish the need and the amount of scholarship assistance.

****THIS INFORMATION IS STRICTLY CONFIDENTIAL****

Parent/Guardian 1	Parent/Guardian 2
Name:	Name:
Home Address:	Home Address:
Town, State, Zip:	Town, State, Zip:
Employer:	Employer:
Years with company:	Years with company:

Note: Students who have received EXETER SUMMER financial aid in the past are not eligible to receive financial aid for EXETER SUMMER 2019. Financial aid is available to U.S. citizens only. Applying for financial aid places the student in a more competitive situation for admission.

Print Student's Name:	ID Number:
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Provide **current** year (2018-19) information below for all dependent children. Enter first and last names.

Full Name: List Applicant First	Age	Does student live with parents?	Name of School or College	Year in School or College	Cost for One Year	Amount of Yearly Cost Paid by Parent
1.						
2.						
3.						
4.						
5.						

Provide **next** year (2019-2020) information below for all dependent children. Enter first and last names.

Full Name: List Applicant First	Age	Does student live with parents?	Name of School or College	Year in School or College	Cost for One Year	Amount of Yearly Cost Paid by Parent
1.						
2.						
3.						
4.						
5.						

Parents'/Guardians' Annual Income and Expenses		
Total Taxable Income Before Deductions	2018	Estimate 2019
A. Parent/Guardian 1 Salaries and Wages	\$	\$
B. Parent/Guardian 2 Salaries and Wages	\$	\$
C. Other Income - Interest, dividends, etc.	\$	\$
D. Alimony Received (do not include child support here)	\$	\$
E. TOTAL of A, B, C, and D	\$	\$
F. Business Expenses (please explain in space provided on page 4)	\$	\$
G. TOTAL Net Income (amount of money in part E minus part F)	\$	\$
Total Nontaxable Income	2018	Estimate 2019
H. Child Support Received	\$	\$
I. Social Security Benefits	\$	\$
J. Other Nontaxable Income	\$	\$
K. TOTAL of H, I, and J	\$	\$
Miscellaneous Expenses	2018	Estimate 2019
L. Medical and Dental Expenses (expenses NOT covered by insurance)	\$	\$
M. Other Expenses (please explain in space provided on page 4)	\$	\$
N. TOTAL of L and M	\$	\$

Parents' Assets and Liabilities

Information about your home or rental if not owned

Home (if owned) Year Purchased	Purchase Price (if owned) or Monthly Rent (if renting)	Present Market Value (if owned)	Amount of Unpaid Principal on First Mortgage (if owned)	Annual Payments on First Mortgage or Rental: 12 x Monthly Payment
	\$	\$	\$	\$
Do you have a second mortgage? <input type="checkbox"/> YES <input type="checkbox"/> NO	Year of Second Mortgage	Year of Equity Loan	Amount of Unpaid Principal on Second Mortgage/Equity Loan	Annual Payments on Second Mortgage/Equity Loan
			\$	\$
			Total Unpaid Principal on all Mortgages and Equity Loans on Your Home	Total Annual Payments on all Mortgages and Equity Loans on Your Home
			\$	\$

Other Real Estate and Assets

1) Other Real Estate Year purchased	Purchase Price	Present Market Value of all other real estate	Unpaid Mortgage Principal	Total Annual Mortgage Payments 12 x Monthly Payment
	\$	\$	\$	\$
What is the purpose/use of other real estate? <input type="checkbox"/> vacation <input type="checkbox"/> business <input type="checkbox"/> rental <input type="checkbox"/> other _____				
2) Bank Accounts: Total of Parents' Checking and Saving Accounts	Checking Account(s) Total	Savings Account(s) Total	Money Market Account(s) Total	Grand Total All Account(s)
	\$	\$	\$	\$
3) Motor Vehicles	Vehicle #1	Vehicle #2	Vehicle #3	Vehicle #4
Year and Make				
Own/Lease	<input type="checkbox"/> Own <input type="checkbox"/> Lease	<input type="checkbox"/> Own <input type="checkbox"/> Lease	<input type="checkbox"/> Own <input type="checkbox"/> Lease	<input type="checkbox"/> Own <input type="checkbox"/> Lease
4) Other Investments/Assets Boats/Other Recreational Vehicles	Other #1	Other #2	Other #3	Other #4

***Note that EXETER SUMMER tuition does not include books, travel, spending money, SAT Prep., SSAT Prep., Exeter Elite Soccer Club, Exeter Crew, Elite Volleyball, private music lessons, or optional off-campus excursions.**

With this in mind please give us your best estimate of how much you can pay towards EXETER SUMMER tuition below. Because Exeter has limited funds available for financial aid, we ask that you give an accurate estimate of what you can afford for tuition. As a general policy, EXETER SUMMER does not grant full scholarships.

Amount parents can contribute towards tuition: \$ _____ *

Amount student can contribute towards tuition: \$ _____ *

This Section is Required: Use this space to document explanations and/or provide additional information that you believe would be helpful to the Admissions Committee as they review your financial aid questionnaire. (Leaving this section blank will result in your financial aid application being considered incomplete.)

Continued from page 4:

Attach additional pages if necessary.

The information below must be filled out completely. Your name below indicates that the information reported on this form, to the best of your knowledge and belief, is a true and accurate statement of your financial situation.

Parent/Guardian 1 Name:	Parent/Guardian 2 Name:
Home Number:	Home Number:
Cell Number:	Cell Number:
Work Number:	Work Number:
E-mail:	E-mail:
Date Completed:	