



King David High School
בית ספר תיכון "המלך דוד"

**Tuition Assistance Application
2010 - 2011**

**This Application is to be submitted with your
Enrollment or Re-enrollment Package**

KDHS Policy - Governing Principles

KDHS Tuition Assessment Policy is governed by the principle that a Jewish student will not be denied a Jewish education because of financial circumstances. The tuition assessment policy and process are designed to be confidential, fair and consistently applied for all families provided that all requested information is provided to the Tuition Assessment Committee (TAC) to make a fair and reasonable assessment.

Consideration of Financial Means

Tuition assessment takes into consideration the financial means of the applicant. In addition to reported income from all sources, the applicants' assets, debts and lifestyle are taken into account in determining an equitable assessment. This is consistent practice among Jewish day schools in North America.

Confidentiality

The Tuition Assessment Committee will treat information submitted in Tuition Assistance Applications and the fact of the submission of such an application on a confidential basis. Tuition Assistance Applications are handled by an independent Tuition Assessment Committee.

Late Applications

The tuition assessment process relies on individuals who volunteer their time. To ensure that these individuals are available to do this work effectively, deadlines and information requirements must be met. As well, timely knowledge of total tuition revenue is important for the responsible financial management of KDHS.

PLEASE NOTE:

The Tuition Assessment Committee uses your 2009 tax year returns to assess tuition assistance. If your 2009 tax information is not available you must include your 2008 CRA Tax Assessment for preliminary assessment. Your 2009 CRA Assessment must be submitted by June 30. Please remember to submit both personal and business tax information.

- Should family net worth exceed \$1,250,000 full tuition will be charged regardless of family income.
- KDHS may request supporting documentation to substantiate net worth disclosure.
- Please review all of your information and be sure to indicate the amount of Tuition Assistance you are requesting on Page 3. Incomplete applications will not be processed by the Assessment Committee until all documentation is received.

The completed Application form and supporting documentation must be submitted at the same time as the Enrollment or Re-enrollment Package. Submit the Tuition Assistance Application in a sealed envelope marked: "Tuition Assessment Committee".

Please indicate the Tuition Amount you are able to pay

Tuition Amount: \$ _____ ****(Required)****

ADDITIONAL INFORMATION

Please use this page to explain any extenuating circumstances such as illness, misfortune or any additional burdens which you may have encountered recently which you feel contributes to any exceptional circumstances that the tuition assessment committee should consider.

(Please include additional pages if necessary)

RELEASE OF FINANCIAL INFORMATION

NAME(S) AND GRADE(S) OF SIBLING(S) ATTENDING OTHER JEWISH DAY SCHOOL(S):

1. _____
2. _____
3. _____

I hereby authorize the Tuition Assessment Officer of:

to release my financial information to the Tuition Assessment committee of .

NAME

SIGNED

DATE

STUDENT INFORMATION

Applicant(s) as indicated in this Application Package:

STUDENT NAME:	ENTERING GRADE:
STUDENT NAME:	ENTERING GRADE:
STUDENT NAME:	ENTERING GRADE:

DECLARATION

I / We, the undersigned, understand that:

- This tuition assessment application is subject to reassessment by the Tuition Assessment Committee at any time.
- This application will not be processed until the form is received by KDHS, fully completed and signed, together with all supporting information and documentation required.
- Incomplete applications and applications received 30 days after due date may be subject to penalty of \$25 per month late.
- You are entitled to one appeal within two (2) weeks of the date of the Tuition Assessment Letter indicating the assessed fee. Appeals received later than this date may not be considered.
- I/We agree to accept the decision of the Tuition Assessment Committee (TAC) and upon approval of assessed fee I/We will complete a Tuition Fee Payment Form and submit payment (or post-dated payments) by cheque or authorized Visa or MasterCard for the assessed amount.

To the best of my/our knowledge, all the information provided on this application is true and complete, and I/We shall immediately notify the Tuition Assessment Committee of any changes in my/our household's financial position that may occur during the next 12 months.

NAME OF APPLICANT

SIGNATURE

DATE

INFORMATION TO BE INCLUDED WITH THIS APPLICATION FORM

Copies of the following information **must be submitted** along with the completed application form:

CHECKLIST:

2008 CRA Assessments will be accepted for preliminary tuition evaluations. 2009 Income Tax Returns and CRA Notices of Assessment must be provided for confirmation no later than June 30, 2010.

New Families

- 2008 or 2009 Income Tax Returns - individual (both parents) and business;
- 2008 or 2009 CRA Notices of Assessment;
- Most recent Fiscal Year Ending Financial statements of businesses or partnerships;
- 2010 Statements of rental income and expenses.

Returning Families

- 2009 CRA Notices of Assessment;
- Most recent Fiscal Year Ending Financial statements of businesses or partnerships;
- 2010 Statements of rental income and expenses.

INFORMATION REQUIRED FROM FAMILIES THAT ARE NEW TO VANCOUVER

Date of arrival in: VANCOUVER: _____ CANADA: _____
day / month / year day / month / year

Arriving From: _____ Citizenship: _____

If new to Canada, immigration status: _____

MARITAL STATUS OF PARENT(S) OR GUARDIAN(S):

- MARRIED SEPARATED DIVORCED WIDOWED SINGLE

INFORMATION TO BE SUBMITTED FROM SEPARATED OR DIVORCED PARENTS

Financial information from both parents will be taken into consideration in determining ability to pay tuition fees. **Each parent is to remit a separate copy of the Tuition Assistance Package.** Copies are available at KDHS or on our Web site www.kdhs.org

Details of how tuition payments will be divided - proportion from each parent:

PARENT/GUARDIAN 1 _____ % PARENT/GUARDIAN 2 _____ %

OTHER (PLEASE EXPLAIN):

Has this Tuition Assessment Application been completed based upon the financial means of both parents? Yes No

If No, please provide an explanation:

GENERAL INFORMATION:

PARENT / GUARDIAN 1:

Name(s): _____

Relationship: Mother Father Step- Parent Grandparent Other _____

Employed Self-Employed Sole Proprietor Business Owner Other _____

Occupation / Profession: _____

Full time Part-time

Employer Name: _____

Address: _____

Business Name: _____

Address: _____

Home Telephone: _____ Business Telephone: _____

Cel Phone: _____ Email: _____

Signature: _____ Date: _____

PARENT / GUARDIAN 2:

Name(s) _____

Relationship: Mother Father Step- Parent Grandparent Other _____

Employed Self-Employed Sole Proprietor Business Owner Other _____

Occupation / Profession: _____

Full time Part-time

Employer Name: _____

Address: _____

Business Name: _____

Address: _____

Home Telephone: _____ Business Telephone: _____

Cel Phone: _____ Email: _____

Signature: _____ Date: _____

OTHER CHILDREN (NOT ATTENDING KDHS):

CHILD'S NAME: _____ AGE: _____ NAME OF SCHOOL: _____

OTHER DEPENDENTS OR INDIVIDUALS RESIDING AT APPLICANTS' RESIDENCE:

NAME: _____ RELATIONSHIP: _____

FINANCIAL MEANS WORKSHEET:

PLEASE ANSWER THE FOLLOWING QUESTIONS TO THE BEST OF YOUR ABILITY:		PARENT 1	PARENT 2
1.	Are you currently employed?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
2.	Were you employed in 2009?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
3.	Do you own or partially own a business or partnership?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
4.	Did you own or partially own a business or partnership, including any shares in a company in 2009?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
5.	Were you unemployed at anytime in 2009. Please provide dates.	<input type="checkbox"/> yes <input type="checkbox"/> no Dates: _____	<input type="checkbox"/> yes <input type="checkbox"/> no Dates: _____
6.	Do you expect your income or assets to change significantly over the next several months? (i.e. gifts, change in employment, etc.) If yes, please provide a brief explanation below.	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

	GROSS FAMILY INCOME IN 2009	PARENT 1	PARENT 2
1.	Total income as shown on line #150 of your 2009 Income Tax return. (Attach copy of your return and CCRA Assessment).	\$ _____	\$ _____ -
	Note: If you were not a Canadian citizen and did not report Canadian income, please report the equivalent information from the Country of which you last reported income.	\$ _____	\$ _____ -
2.	Add amounts deducted on Statement of Income & Expenses or Rental Statement for non-cash expenses such as depreciation / CCRA, use of home for business.	\$ _____	\$ _____ -
3.	Add your share of undistributed income of Partnership or Incorporated business(es).	\$ _____	\$ _____ -
4.	Add/Subtract non-taxable income (loss on investments in excess of actual cash payments.	\$ _____	\$ _____ -
5.	Subtract difference between taxable dividends and actual dividends received.	\$ _____	\$ _____ -
	TOTAL REPORTABLE INCOME 2009:	\$ _____	\$ _____ -

	ANNUAL FAMILY INCOME ESTIMATED FOR 2010	PARENT 1	PARENT 2
1.	Net employment, business income:	\$ _____	\$ _____ -
2.	Investments, (interest, dividends, rental)	\$ _____	\$ _____ -
3.	Child Tax Benefit	\$ _____	\$ _____

			-
4.	Allowances, support from others:	\$ _____	\$ _____ -
5.	Employment Insurance.	\$ _____	\$ _____ -
6.	Disability or Insurance Income / Benefits	\$ _____	\$ _____ -
TOTAL ESTIMATED INCOME FOR 2010		\$ _____	\$ _____ -
ANNUAL FAMILY BUDGET AND EXPENSES– ESTIMATED FOR 2010			
1.	Rent or Mortgage		\$ _____
2.	Property Taxes		\$ _____
3.	Auto Payments (lease or own)		\$ _____
4.	Auto Expenses (fuel, maintenance, insurance)		\$ _____
5.	Other Transportation, Bus Fare, Skytrain, etc.		\$ _____
4.	Insurances (personal and property)		\$ _____
5.	Synagogue Dues		\$ _____
6.	Professional Dues:		\$ _____
7.	Utilities (gas, hydro)		\$ _____
8.	Communications (telephone, cel, internet and cable)		\$ _____
9.	Childcare (daycare, pre-school, nanny services)		\$ _____
10.	Medical Insurance:		\$ _____
11.	Tuition Fees (other than KDHS)		\$ _____
12.	Groceries		\$ _____
13.	Medical / Dental Expenses:		\$ _____
14.	Clothing, personal care:		\$ _____
15.	Support of other relatives outside the family home (specify)		\$ _____
16.	Home Improvements / Maintenance:		\$ _____

17.	Household Cleaning Service	\$
18.	Club Membership Fees:	\$
19.	Babysitting	\$
20.	Summer Camp	\$
21.	Extra-curricular Activities	\$
22.	Vacations	\$
	TOTAL ESTIMATED BUDGET & EXPENSES FOR 2010	\$
	TOTAL ESTIMATED INCOME FOR 2010	\$
	TOTAL ESTIMATED BUDGET & EXPENSES FOR 2010	\$
	DIFFERENCE:	\$

NET WORTH DISCLOSURE FORM

This net worth disclosure form will be used for the sole purpose of determining tuition eligibility, except as otherwise required or permitted by law.

PRINCIPAL RESIDENCE:

ADDRESS:		
<input type="checkbox"/> OWN	<input type="checkbox"/> LEASE / RENT	
DATE OF PURCHASE:		<input type="checkbox"/> SHARED ACCOMMODATION
PURCHASE PRICE:		<input type="checkbox"/> LIVING WITH FAMILY / FRIENDS
CURRENT ASSESSMENT		
ESTIMATED VALUE:		RENT PER MONTH:
MORTGAGE:		
MONTHLY PAYMENT		

OTHER PROPERTY:

Do you own or co-own a home that is not your principal residence? (i.e. property outside of Canada and/or recreational property). YES NO. If so please provide details.

ADDRESS:		
DATE OF ACQUISITION:		
PURCHASE PRICE:		
CURRENT ASSESSMENT		
ESTIMATED VALUE:		
MORTGAGE:		
MONTHLY PAYMENT		

NON REPORTABLE INCOME:

(Disclose all non-reportable income received in 2009, i.e alimony, child support, trust income and distributions, offshore income for all family members)

Income Source: _____ Amount: _____

Income Source: _____ Amount: _____

Income Source: _____ Amount: _____

VEHICLES:

MAKE / MODEL	YEAR	PURCHASE VALUE	OWN / LEASE	PAYMENT

ASSETS AND LIABILITIES:

ASSETS		LIABILITIES	
CASH, GIC's, TD's, ETC.	\$	Mortgage	\$
Stocks, Bonds and Mutual Funds	\$	Bank Credit Lines	\$
Accounts Receivable	\$	Personal Loans	\$
Real Estate	\$	Real Estate Loans	\$
Shareholder Loans rec.	\$	Other	\$
RRSP's	\$		\$
Private Company Holdings	\$		\$
Trust Interest	\$		\$
Other	\$		\$
Total:	\$		\$

I/ We hereby certify that the information set out herein in this net worth disclosure is true and complete. No information which might affect King David High School's decision to assess tuition has been omitted or withheld.

I/ We acknowledge that should King David High School discover additional, undisclosed information pertaining to our/my net worth, King David High School at its sole discretion, may reassess our/my net worth and that may impact on tuition due the school.

I/ We consent that the information contained herein may be shared with appropriate Jewish Day Schools as indicated herein for the purposes of calculating "net worth" for tuition purposes.

Parent/Guardian 1: _____

Signed _____ Date: _____

Parent/Guardian 2: _____

Signed _____ Date: _____

Both signatures are required