Smart Aid – Information needed to complete application

This year the Archdiocese of Philadelphia and BLOCS are using a new online platform to apply for EITC funding. This platform differs from the prior years and also asks more detailed information to get a better understanding of a family’s level of assistance needed.

Before starting your online application, you should have the following information assembled and ready for input. Since the online platform is new and at times is slow or has technical glitches, it is best to fill out this helpful guide before starting your online application so it can be easily reentered if the program has a temporary glitch and your information is lost for that page of input.

**Section 1 - Household/Dependent information**

College Students – select “attending another private school” when filling out application online.

Tuition \_\_\_\_\_\_\_\_\_\_\_\_\_\_ College \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Paid by family/student (includes loans) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other (scholarships/grants received) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Tuition \_\_\_\_\_\_\_\_\_\_\_\_\_\_ College \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Paid by family/student (includes loans) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other (scholarships/grants received) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 2 – School information**

School – enter code for Holy Family 91010 and hit search icon and select Holy Family

Student – Once school is entered select the student/students for that school

* Please note that the system may not save the school code information and this may have to be reentered each time you access your application. According to SmartAid, the school information can be seen on their end even if you do not see it each time you enter application. Reenter anyway just to be on the safe side.

Enter grade for each student. The tuition amount is preset so only $1 will show. Just save and continue with the application.

**Section 3 - Income & Expenses**

**Income:**

Wages (W-2 employees) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Income \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Other Monthly income:**

Welfare/TANF \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Food stamps \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Child support \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Alimony received \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Retirement/IRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Social security benefits:**

Parents \_\_\_\_\_\_\_\_\_\_\_\_\_ Dependents \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Housing Allowance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_

**Other Sources of income:** Veterans Benefits Foster Care Other

**Other Annual Sources of Income:**

Interest & Dividends \_\_\_\_\_\_\_\_\_\_\_ Workers Comp \_\_\_\_\_\_\_\_\_\_\_

Unemployment \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Misc. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Identify source of misc. income: Capital gains Inheritance Winnings 1099-M

Assistance from friends/relatives Other

**Household Expenses:**

Renters – Monthly rent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Homeowners – Monthly mortgage \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Market value of home \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Amount owed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Property Taxes \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Homeowner’s insurance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Electric (12 months) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Gas/Oil for home (12 months) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Water/Sewer (12 months) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Other Expenses:**

Child support paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Alimony paid \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Medical expenses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Child care \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Elderly care \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Charitable contributions:

 Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Amount \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Vehicle expenses:**

Lease – Finance/own – both – none

# of vehicles \_\_\_\_\_\_\_\_\_\_\_

Value of all vehicles \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly payments \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount owed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Auto insurance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Recreational vehicles/boats:**

Value \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly payment \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount owed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Real estate investments/2nd home:**

# of properties \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Type – rental, recreational, business investment, farm land

Market value \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Prior year Gross Rental Income \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Amount owed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Prior year Gross Property Expenses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Monthly loan payment \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Section 4 – Assets & Debt**

**Current Assets:**

Cash Checking account \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Savings account \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Cash on hand \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Certificate of Deposit (CD) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Stocks, Bonds \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Retirement funds:**

Pension Plans (self-managed, IRA)

Contributions to plan by Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year-end value of plan assets \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other managed plans (401K, 403B, Roth)

Contributions to plan by Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Year-end value of plan assets \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(if you do not know all this information, it can be estimated. You can still move forward with application)

**Debt:**

Credit card \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Bank \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Student/Education loans:

Parents (loans taken out for parents education) Loan balance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Dependents (loans taken out by parents for students education/not students federal loans) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Special circumstances/Other info**

Will ask public school your child is assigned to and what high school parents graduated from.

There is also a section to check off particular family circumstances and a place to give additional information.

**Submit:**

Family ID codes:

NSF – New student

RSF – returning student

CSF – code not currently being used

**NOTE: Use your 2015 tax information to complete your online application. You will be required to submit your 2016 tax return by 3/31/16.**