

Parents' Financial Statement

2022-2023 PFS screenshots in the Family Portal

Household Information

Household Information

1. Parent/Guardian Information

Cancel

Save & Exit

Save & Next

Fill in the contact information exactly as you do on tax and other official forms. Your legal name will help us verify documents more quickly. The person who registers to create a PFS Online account will automatically be listed as Parent/Guardian A. Parent/Guardian A first and last names cannot be edited.

Parent/Guardian A													
Prefix	--None--												
First Name	Benjamin												
Middle Name													
Last Name	Weist												
Suffix	--None--												
Birthdate	7/16/1992 [9/1/2021]												
Gender	Male												
Language	English												
Personal Circumstance(s) (select all that apply)	<table><tr><td><input type="checkbox"/></td><td>Expecting Child</td></tr><tr><td><input type="checkbox"/></td><td>Recently Divorced or Separated</td></tr><tr><td><input type="checkbox"/></td><td>Widowed</td></tr><tr><td><input type="checkbox"/></td><td>Non-Custodial Guardian</td></tr><tr><td><input type="checkbox"/></td><td>Military (Active or Veteran) or Clergy Member</td></tr><tr><td><input type="checkbox"/></td><td>Faculty or Staff at the School</td></tr></table>	<input type="checkbox"/>	Expecting Child	<input type="checkbox"/>	Recently Divorced or Separated	<input type="checkbox"/>	Widowed	<input type="checkbox"/>	Non-Custodial Guardian	<input type="checkbox"/>	Military (Active or Veteran) or Clergy Member	<input type="checkbox"/>	Faculty or Staff at the School
<input type="checkbox"/>	Expecting Child												
<input type="checkbox"/>	Recently Divorced or Separated												
<input type="checkbox"/>	Widowed												
<input type="checkbox"/>	Non-Custodial Guardian												
<input type="checkbox"/>	Military (Active or Veteran) or Clergy Member												
<input type="checkbox"/>	Faculty or Staff at the School												
Contact Information													
Country	United States												

City	<input type="text" value="Wilmington"/>
State	<input type="text" value="North Carolina"/>
ZIP/Postal Code	<input type="text" value="28412"/>
Email ⁱ	<input type="text" value="ryanweist83@gmail.com"/>
Preferred Phone	<input type="text" value="Mobile"/>
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
Mobile Phone	<input type="text" value="(612) 283-4318"/>
Work Information	
Occupation	<input type="text" value="Daydreamer"/>
Employer	<input type="text"/>
Job Title	<input type="text"/>
How many years has the parent/guardian worked for this employer?	<input type="text"/>
If the parent/guardian has more than one job, list additional job(s) here. If the parent/guardian is unemployed, explain here:	<input type="text"/>
Additional Parent	
Does the student(s) have another living biological or legal (adoptive) parent who is NOT listed as Parent/Guardian A or B? ⁱ	<input type="text" value="--None--"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & Exit"/> <input type="button" value="Save & Next"/>	

Additional Parent	
Does the student(s) have another living biological or legal (adoptive) parent who is NOT listed as Parent/Guardian A or B? ⁱ	<input type="text" value="Yes"/> Error: You must enter a value
Other Additional Parent Information	
Please indicate the relationship between Parent/Guardian A or B and this other parent.	<input type="text" value="--None--"/>
First Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name	<input type="text"/>
Suffix	<input type="text" value="--None--"/>
Contact Information	
Country	<input type="text" value="--None--"/>
Address	<input type="text"/> 255 of 255 remaining
City	<input type="text"/>
State	<input type="text" value="--None--"/>
ZIP/Postal Code	<input type="text"/>
Phone ⁱ	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & Exit"/> <input type="button" value="Save & Next"/>	

2. Student Applicant Information

Cancel

Save & Exit

Save & Add Another Applicant

Save & Next

Fill in the applicant information exactly as you do on tax and other official forms. Please confirm that the information entered is correct. Once an applicant is saved the name can no longer be edited.

▼ Applicant 1

First Name	Charlie Bean
Middle Name	Bahg
Last Name	Weist
Suffix	--None--
Birthdate	1/3/2012 [9/1/2021]
Gender	Male
Social Security Number (enter last 4 digits only)	XXXX
Current Grade ⁱ	5
Current School	DO NOT APPLY
What grade will the student enter in 2022?	6
Is this Student Applicant a Foster child?	No
What is the relationship of Parent/Guardian A to this Student Applicant? <small>(Parent A: Benjamin Weist)</small>	Father
What is the relationship of Parent/Guardian B to this Student Applicant? <small>(Parent B: Ryan Weist)</small>	Father
Does/Will this student applicant live with any other parent/guardian outside of your household, part-time or full-time?	No

Delete Applicant

▼ Applicant 2

First Name	Pinto Bean
Middle Name	Stalk
Last Name	Weist
Suffix	--None--
Birthdate	11/4/2015 [9/1/2021]
Gender	Male
Social Security Number (enter last 4 digits only)	XXXX
Current Grade ⁱ	4
Current School	TADS Test
What grade will the student enter in 2022?	5
Is this Student Applicant a Foster child?	Yes
What is the relationship of Parent/Guardian A to this Student Applicant? <small>(Parent A: Benjamin Weist)</small>	Father, adoptive
What is the relationship of Parent/Guardian B to this Student Applicant? <small>(Parent B: Ryan Weist)</small>	Father, adoptive
Does/Will this student applicant live with any other parent/guardian outside of your household, part-time or full-time?	No

Delete Applicant

Cancel

Save & Exit

Save & Add Another Applicant

Save & Next

Family Portal: 2022-2023 PFS screenshots

FOR SCHOOL REFERENCE PURPOSES ONLY. This is not an application. Do not send to COMMUNITY BRANDS or share with families.

3. Non-Applicant Dependent Information

Cancel Save & Exit Save & Next

In the PFS, a dependent is identified as an individual - child or adult - for whom you provide at least 50% of their financial support each year. Include children for whom you provide support, even if they do not live with you. If you have dependents who are not children, include them here. DO NOT include children who are applicants.

Click to Add New Dependent

Enter information for all dependent individuals in your household who are NOT applying for financial aid at an SSS subscriber school.

Dependent 1

Full Name	
Birthdate	[9/1/2021]
Gender	--None--
Current Grade	--None--
Current School	
Do you own any 529 Savings Plan accounts with this dependent as beneficiary?	--None--
Delete Dependent	

Cancel Save & Exit Save & Next

4. Household Summary

Cancel Save & Exit Save & Next

Parents/Guardians				
	Role	Name	Gender	Birthdate
edit	Parent A	Benjamin Weist	Male	07/16/1992
edit	Parent B	Ryan Weist	Male	10/15/1983
Applicants				
				New Applicant
	Name	Gender	Birthdate	
edit delete	Charlie Bean B. Weist	Male	01/03/2012	
edit delete	Pinto Bean S. Weist	Male	11/04/2015	
Dependents				
				New Dependent
	Name	Gender	Birthdate	

☒ have reviewed the Parents/Guardians, Applicants and Dependents entered on this application and I verify they are correct.*

Cancel Save & Exit Save & Next

Select Schools

School Selection

5. Select Schools

Cancel

Save & Exit

Save & Next

Look Up and Select Schools and Organizations

Enter Partner Code Enter School Name

Select Country State/Province Enter City Enter Zip Code

Schools and Organization Found: 3 (Clear Search Criteria)

Click the "Select" button next to the School or Organization you are applying to.

	School Name	Address	SSS Code
<input type="button" value="Remove"/>	DO NOT APPLY Test School	123 Treesome Street, Fairfax, VA 22033	9000
<input type="button" value="More information"/>	SSP Short Form Test Account	139 West Main, Someplace, MD 14000	200262
<input type="button" value="Remove"/>	TADS Test School 1		200164

Assign Student Applicants to Schools or Organizations

Please assign your Student Applicant to your selected School(s) or Organization(s). You will need to input their current enrollment status and if they will be attending the day school or boarding (if applicable).

Selected Schools: DO NOT APPLY Test School , TADS Test School 1

Student Applicant	School Name	School information										
<input type="text" value="Pinto Bean Weist"/>	<input type="text" value="TADS Test School 1"/>	<p>US</p> <p>You can choose to have TADS FA send e-mail reminders to your families regarding outstanding required documents or un-submitted PFSs.</p> <p>If sending email reminders for tax documents:</p> <ul style="list-style-type: none">The PFS deadline must come BEFORE deadlines for tax documents.Reminders are sent on the school's behalf on the date you indicate below.NOTE: TADS FA sends a second email reminder 7 days later to families who have not fulfilled document requirements after the first reminder.Updating admissions and enrollment status prevents document reminder emails going to families who should not receive them. <table><tr><td>Partner Code</td><td>Day/Boarding</td><td>Currently Enrolled?</td><td>Student ID</td><td>Submission Deadline</td></tr><tr><td>200164</td><td><input type="text" value="Day"/></td><td><input type="text" value="Yes"/></td><td><input type="text" value="1234567890"/></td><td></td></tr></table> <p><input type="button" value="Apply to School"/></p>	Partner Code	Day/Boarding	Currently Enrolled?	Student ID	Submission Deadline	200164	<input type="text" value="Day"/>	<input type="text" value="Yes"/>	<input type="text" value="1234567890"/>	
Partner Code	Day/Boarding	Currently Enrolled?	Student ID	Submission Deadline								
200164	<input type="text" value="Day"/>	<input type="text" value="Yes"/>	<input type="text" value="1234567890"/>									

Schools or Organizations you are Applying to

Select the "Edit" option to change the enrollment or day/boarding selections for your applicant(s).

Edit

Applicant: Charlie Bean Weist						
School Name	Address	Partner Code	Day/Boarding	Currently Enrolled?	Submission Deadline	
DO NOT APPLY Test School	Fairfax, VA	9000	<input type="text" value="Day"/>	<input type="text" value="Yes"/>	07/20/2022	<input type="button" value="Remove School"/>
Applicant: Pinto Bean Weist						
School Name	Address	Partner Code	Day/Boarding	Currently Enrolled?	Submission Deadline	
TADS Test School 1		200164	<input type="text" value="Day"/>	<input type="text" value="Yes"/>		<input type="button" value="Remove School"/>

Cancel

Save & Exit

Save & Next

Family Portal: 2022-2023 PFS screenshots

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Family Income

Family Income

6. Basic Tax Information

Cancel Save & Exit Save & Next

6a. Have you completed your 2021 tax return? It is not a requirement that you have completed your 2021 tax return to complete this PFS.* Estimated

6b. What was/will be your income tax filing status for 2021? If Parent/Guardian A and B have different tax filing statuses, enter the status of the individual entered as Parent/Guardian A on this application.* Married, Filing Jointly

6d. Enter your adjusted gross income for 2021. If Parent A and B file separately, enter the adjusted gross income for the individual entered as Parent/Guardian A on this application.* 195000

6f. Did you file a Schedule A along with your tax returns? No

6h. Enter the amount of your total federal income taxes. 2367

If you only receive Dividend or Interest Income from investments reported on Form 1099-DIV or 1099-INT, do not count yourself as self-employed.

6i. Was Parent A or B self-employed in 2021? This includes earning income (reported on Schedule C, E, F, and/or Form K-1) as an independent contractor, freelancer, sole proprietor of a business/farm, partner in a Partnership, and/or S Corp shareholder. Yes

6j. How many businesses or farms do you own or part-own? 1

Cancel Save & Exit Save & Next

Family Income

7. Total Taxable Income

Cancel Save & Exit Save & Next

▼ Salary & Wages

Total salaries and wages can be found on the W2 form given to you by your employer. In Box 1, of your W2 form, you will find your Total Salaries or Wages. If you have more than one W2, add the amounts from Box 1 on each W2 and enter the total in PFS Question 7A. Do not report the profit or loss from a business and/or farm as salary or wages. There is a separate section where you will be asked about your business and/or farm income.

	2021 (Estimated)	2021	2022 (Estimated)
7a. Enter total salaries and wages earned by Parent/Guardian A (Only report W2 income here):	\$50,000	50000	55000
7b. Enter total salaries and wages earned by Parent/Guardian B (Only report W2 income here):	\$38,000	38000	40000

▼ Dividends & Interest Income

Line 1 on the 1099-INT shows your interest income. Line 1A on your 1099-DIV shows your dividend income. Do not report the value of your income-generating investment accounts here. This is reported in the Family Assets section.

	2021 (Estimated)	2021	2022 (Estimated)
7c. Enter total interest income:	\$3	3	3
7d. Enter total dividends	\$0	0	0

▼ Adjustments to Income

	2021 (Estimated)	2021	2022 (Estimated)
7e. Enter the total amount of adjustments reported.*	\$5,000	5000	5000
7f. Enter the total Individual Retirement Account (IRA) pre-tax payments.	\$5,000	5000	5000
7g. Enter the total Keogh, Simplified Employee Payment (SEP), SIMPLE, and/or other qualified plan payments.	\$0		

7h. Enter your deductible part of self-employment tax. ⓘ	\$0	<input type="text"/>	<input type="text"/>
7i. Itemize your other adjustments here. ⓘ		255 of 255 remaining	

▼ Other Taxable Income

Other taxable income includes income you received from pensions, annuities, rental properties, royalties, estates or trusts, household expenses paid in lieu of alimony, unemployment compensation benefits, capital gains, and taxable social security benefits.

If you file a Schedule C for business income or Schedule F for farm income, you will be asked to report that in Sections 15-19. Do not include that income here in Section 7.

This worksheet will calculate the values for other taxable income you received in 2021 and the amount you estimate you'll receive in 2022. All fields are required. Enter zero (0) in the fields for which no other value applies.

	2021 (Estimated)	2021 ⓘ	2022 (Estimated) ⓘ
7j. Enter the taxable amount of any IRA distributions you received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7k. Enter the taxable amount of pensions and annuities you received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7l. Enter the taxable amount of any Social Security benefits you received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7m. Enter the amount of alimony you received. This does not include child support.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7n. Enter the total taxable amount of any refunds you received in 2021 and the amount you estimate for 2022.* ⓘ	\$500	<input type="text" value="500"/>	<input type="text" value="500"/>
7o. Enter the total taxable amount of any capital gains (or losses) you received in 2021 and the amount you estimate for 2022.* ⓘ	(\$1,000)	<input type="text" value="-1000"/>	<input type="text" value="-1000"/>
7p. Enter any other gains (or losses) you received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7q. Enter the taxable amount of any income received from rental real estate, royalties, partnerships, S Corps, trusts, etc. in 2021 and the amount your estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7r. Enter the amount of any unemployment compensation received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
7s. Enter the taxable amount of any other income you received in 2021 and the amount you estimate for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
The total "Other Taxable Income" you received:	(\$500)	\$-500	\$-500

8h. Enter the cash value of veteran's benefits received in 2021 and the amount estimated for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8i. Enter the cash value of disability benefits received in 2021 and the amount estimated for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8j. Enter the total income you received from workers' compensation in 2021 and the amount estimated for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8k. Enter the total value of all allowances you received for housing, food, and other living expenses in 2021 and the amount you estimate for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>

▼ Other Nontaxable Income

	2021 (Estimated)	2021 ⓘ	2022 (Estimated) ⓘ
8l. Enter the total value of all cash support, gifts, or money paid to you (or to others on your behalf) by relatives or non-relatives in 2021 and the amount you estimate for 2022.*	\$1,000	<input type="text" value="1000"/>	<input type="text" value="1000"/>
8m. Enter the total amount paid by a separated or divorced spouse (in lieu of child support) to cover household expenses in 2021 and the amount you estimate for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8n. Enter the cash value of earned income credits received in 2021 and the amount estimated for 2022.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8o. Enter the total income you earned from tax-exempt investments in 2021 and the amount estimated for 2022.*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8p. If you earned income abroad, enter that amount here and the amount estimated for 2022. (Refer to Foreign Income Exclusion forms: IRS Form 2555 or 2555EZ.)*	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>

▼ Misc. Other Nontaxable Income

	2021 (Estimated)	2021 ⓘ	2022 (Estimated) ⓘ
8q. Enter any other untaxed income and benefits not included above.* ⓘ	\$0	<input type="text" value="0"/>	<input type="text" value="0"/>
8s. Other total nontaxable income ⓘ	\$6,000	\$6,000	\$6,000

Cancel Save & Exit Save & Next

Family Income

9. Applicant Income

Cancel Save & Exit Save & Next

▼ Income and Assets: Charlie Bean Weist

9a. Did the student earn any income in 2021 or do you expect income in 2022? Answer yes even if the student worked but did not file a tax return.* ⓘ	<input type="text" value="No"/>
9e. Do you own any 529 Savings Plan accounts with this student as beneficiary?*	<input type="text" value="Yes"/>
9f. Enter the total current value of all 529 accounts you hold for this student.*	<input type="text" value="17000"/>
9g. Does this student own any 529 Savings Plan accounts with himself/herself as beneficiary?*	<input type="text" value="No"/>
9i. Are there any other 529 Savings Plan accounts held by someone else with this student as beneficiary?*	<input type="text" value="No"/>
9k. Does the student have any assets?*	<input type="text" value="No"/>

When determining if the student has any assets, please consider these instructions.


Include:

- Net value of student's savings account(s)
- Net value of student's IRA, stocks, bonds, inheritances, trust funds, and real estate
- Cash value of annuities and education insurance policies

Do not include:

- Life insurance policies, stamp or coin collections, value of personal property

▼ Income and Assets: Pinto Bean Weist

9a. Did the student earn any income in 2021 or do you expect income in 2022? Answer yes even if the student worked but did not file a tax return.* 

No ▼

9e. Do you own any 529 Savings Plan accounts with this student as beneficiary?*

Yes ▼

9f. Enter the total current value of all 529 accounts you hold for this student.*

23000

9g. Does this student own any 529 Savings Plan accounts with himself/herself as beneficiary?*

No ▼

9i. Are there any other 529 Savings Plan accounts held by someone else with this student as beneficiary?*

No ▼

9k. Does the student have any assets?*

No ▼

When determining if the student has any assets, please consider these instructions.

Include:

Net value of student's savings account(s)
Net value of student's IRA, stocks, bonds, inheritances, trust funds, and real estate
Cash value of annuities and education insurance policies

Do not include:

Life insurance policies, stamp or coin collections, value of personal property

Cancel

Save & Exit

Save & Next

Family Assets & Debts

Family Assets & Debts

10. Real Estate

Cancel

Save & Exit

Save & Next

10a. Do you own the home that you currently live in?*

No

2021 (Estimated)

2021

2022 (Estimated)

10b. If you pay rent for the home you currently live in, provide the TOTAL amount in rent for the entire year. Do NOT enter your monthly rent payment.*

19200

20400

▼ All Other Real Estate

10n. Do you own any interest in real estate other than your primary residence or a business or farm?*

No

Cancel

Save & Exit

Save & Next

Family Assets & Debts

10. Real Estate

Cancel

Save & Exit

Save & Next

10a. Do you own the home that you currently live in?*

Yes

If you own more than one residence, answer the questions for the home you reside in most of the year.

10b. What year did you purchase your home?*

2015

10c. What was the purchase price?*

470000

10d. What is the current market value of your home?*

510000

10e. What is the remaining unpaid principal on your first mortgage?*

120000

10g. Enter the total ANNUAL payments on your first mortgage for your home. Do NOT enter your monthly mortgage payment. This should include property taxes, interest payments, insurance payments, and condo/association fees.*

20400

10h. Enter the total property tax for your home (if not included in the mortgage listed in question 10g).*

0

10i. Enter the total cost of Homeowner's or Renter's Insurance (if not included in the mortgage listed in question 10g).*

0

10j. Do you have a second mortgage or home equity loan for your home?*

No

▼ All Other Real Estate

10n. Do you own any interest in real estate other than your primary residence or a business or farm?*	Yes
10o. Select the number of additional properties you own, in full or in part, including a second home, vacation property, undeveloped land, rental property, etc.*	1
10p. Enter your total annual payments on the first mortgage(s) for all the additional properties/real estate you own.*	15000
10q. Enter the gross annual income for all rental properties.*	0
10r. Enter the gross property expenses for all properties.*	7000
10s. Enter the current market value for ALL of your additional real estate.*	210000
10t. Report the remaining unpaid principal on all mortgages for ALL of your additional properties. Do not include interest payments or property taxes.*	37000

Property 1

10u. Property Address:*	3692 Noodleburg Dr. Masterson, TN 31960
10v. Purpose/use of property:*	Vacation home / timeshare
10w. Enter the purchase price for this property.*	210000
10x. Enter the current market value for this property.*	210000
10y. Report the remaining unpaid principal on all mortgages for this property. Do not include interest payments or property taxes.*	37000
10z. Comments	

255 of 255 remaining

Cancel Save & Exit Save & Next

Family Assets & Debts

11. Vehicles

Cancel Save & Exit Save & Next

Family Cars, Boats or Other Recreational Vehicles Owned or Leased

11a. How many family cars, boats or recreational vehicles do you own or lease?	1
--	---

Vehicle 1

11b. Type*	Car
11c. Make*	Toyota
11d. Model*	C-HR
11e. Year*	2020
11f. Ownership Status*	Own
11g. Current Market Value*	20200
11h. Current Debt	19500
11i. Annual Lease Cost	
11j. Notes	Car payments are the worst.

228 of 255 remaining

Cancel Save & Exit Save & Next

Family Portal: 2022-2023 PFS screenshots

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12. Other Assets & Debts

Cancel

Save & Exit

Save & Next

When reporting your accounts and investments in this section, do not include the value of any 529 Savings Plan accounts you have reported elsewhere on this PFS.

▼ Bank Accounts

12a. Enter the total value of the checking and savings accounts (both interest-bearing and non-interest bearing) held by the parent(s)/guardian(s).*

3800

▼ Investments

12b. Enter the total net value of all your investments (market value minus debt).*

0

▼ Retirement Plans

12d. Is there an employee retirement plan for Parent/Guardian A?*

Yes

12e. Is there an employee retirement plan for Parent/Guardian B?*

No

12f. Enter the total value of company managed retirement plans, including pensions, 401k, 403b or SEP plans.*

23500

12g. Enter the total annual household contribution for all retirement savings plans including, IRAs, pensions, 401ks, 403bs, and SEPs.*

2300

12h. Enter the total value of any self managed retirements plans including IRAs.*

0

▼ Debts

12j. Enter your total consumer debt (i.e., total balances from all credit card purchases that you have not reported elsewhere in this PFS).*

9700

12k. Itemize your consumer debts here.*

All credit cards 484 of 500 remaining

12l. Enter your total outstanding debt for past education of the parent(s)/guardian(s).*

36000

12m. Enter your total outstanding debt for any loans taken with a Loan Company.*

0

12n. Enter your total outstanding debt for any loans taken from friends or relatives.*

0

12o. Enter your total outstanding debt from interest bearing medical expenses.*

0

12p. Enter your total other outstanding debt.*

1000

Do include:

Encumbrances against home or other real estate
Debts from investments
Living expenses if business failure, prolonged illness, unemployment, etc, have depleted assets
Past business debt
Natural disasters not insured
Past funeral expenses
Past legal fees

Do not include:

Mortgages
Business, farm, car or consumer debt (purchases charged to credit cards)
Debts for routine home repairs
Schooling expenses for children
Travel expenses
Other debts listed elsewhere in this form

12q. Itemize your other outstanding debts here.*

\$1000 Legal fees 484 of 500 remaining

12r. Enter the amount of this debt that you plan to pay off during 2022.*

12000

Cancel

Save & Exit

Save & Next

Family Expenses

Family Expenses

13. Educational Expenses

Cancel

Save & Exit

Save & Next

13a. Enter the total number of children for whom you will provide support in 2022. Include those students applying for aid AND all other dependent children, even if they do not live with you for the full year.

2

13b. How many of those children will attend tuition-charging childcare centers, schools, or colleges? Do not include children who are cared for by a nanny, or family members.*

2

▼ Applicant 1: Charlie Bean Weist

Was/is this applicant enrolled in a tuition-based preschool, school or college for 2021-2022?*

Yes ▼

Please detail the cost of attendance for this student.

Enter the estimated full cost of tuition for this applicant for the academic year 2021-22.*

35000

Enter the estimated full cost of expenses (bus, books, fees, etc.) for this student applicant for the academic year 2021-22.*

2500

Please detail the tuition contributions for Charlie Bean Weist in 2021-22.

How much money are you contributing from your own earnings or assets (including loans)?*

3000

How much are you contributing from the applicant's earnings or assets?*

0

How much are you receiving from other sources (friends, relatives) excluding financial aid?*

0

How much financial aid are you receiving?*

1200

How much is a non-custodial parent ordered by court to contribute toward the education of this student applicant?*

Please detail the estimated cost of attendance for Charlie Bean Weist in 2022-23.

Enter the estimated full cost of tuition for this applicant for the academic year 2022-23.*

37000

Enter the estimated full cost of expenses (bus, books, fees, etc.) for this student applicant for the academic year 2022-23.*

3000

Please detail the expected or estimated household contributions to tuition for Charlie Bean Weist in 2022-23.

How much money will you contribute from your own earnings or assets (including loans)?*

3000

How much will you contribute from the applicant's earnings or assets?*

0

How much will you receive from other sources (friends, relatives) excluding financial aid?*

0

How much is a non-custodial parent ordered by court to contribute toward the education of this student applicant?*

▼ Applicant 2: Pinto Bean Weist

Was/is this applicant enrolled in a tuition-based preschool, school or college for 2021-2022?*

No ▼

Please detail the estimated cost of attendance for Pinto Bean Weist in 2022-23.

Enter the estimated full cost of tuition for this applicant for the academic year 2022-23.*

29000

Enter the estimated full cost of expenses (bus, books, fees, etc.) for this student applicant for the academic year 2022-23.*

1350

Please detail the expected or estimated household contributions to tuition for Pinto Bean Weist in 2022-23.

How much money will you contribute from your own earnings or assets (including loans)?*

3000

How much will you contribute from the applicant's earnings or assets?*

0

How much will you receive from other sources (friends, relatives) excluding financial aid?*

0

How much is a non-custodial parent ordered by court to contribute toward the education of this student applicant?*

Cancel

Save & Exit

Save & Next

Family Portal: 2022-2023 PFS screenshots

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14. Other Expenses

Cancel

Save & Exit

Save & Next

▼ Health Expenses

14a. Do you have health insurance either through your employer or through the Affordable Care Act?*	<div>No</div>		
14b. Do you carry health insurance through a business that you own?*	<div>No</div>		
	2021 (Estimated)	2021 ⓘ	2022 (Estimated) ⓘ
14c. Enter the total amount you paid for health insurance premiums and plans.* ⓘ	\$4,550	<div>4550</div>	<div>4550</div>
14d. Enter the total health expenses you paid out of pocket that were not reimbursed by insurance or nontaxable benefit accounts such as HSA, FSA, DCA, HSR, etc.* ⓘ	\$1,500	<div>1500</div>	<div>1500</div>
14e. Itemize and explain each type of expense incurred, such as hospital bills, co-pays for appointments or prescriptions, etc.* ⓘ			
<div>\$1,000 - Hospital bills, \$500 - co-pays</div> 216 of 255 remaining			

▼ Child Support & Alimony

Did you make child support or alimony payments in 2021?*	<div>Yes</div>
2021 ⓘ	
14f.3. Enter the total amount you paid in child support for Charlie BeanBahg Weist in 2021.*	<div></div>
14f.4. Enter the total amount you paid in child support for Pinto BeanStalk Weist in 2021.*	<div></div>
14i. Enter the total amount you paid in alimony in 2021.*	<div></div>
14j. What tax year did you begin making alimony payments? ⓘ	<div>--None--</div>

▼ Additional Expenses

2021 ⓘ	
14k. Enter the total amount you paid in utilities in 2021.* ⓘ	<div>1200</div>
14l. Enter the total amount of charitable contributions in 2021.*	<div>100</div>
14m. Itemize the charitable contributions here.*	<div>\$100 - Feeding America</div> 233 of 255 remaining
14n. Enter the total amount you paid in annual fee/club dues for clubs that charge more than \$250 in 2021.* ⓘ	<div>0</div>
14o. Itemize the memberships, including the name and type of club(s) ⓘ	<div></div> 255 of 255 remaining
14p. Enter the total amount you paid for camps, lessons, and sports teams for all members of your household in 2021.* ⓘ	<div>0</div>
14q. Itemize the lessons/camps, including the type and purpose of the camps/lessons. ⓘ	<div></div> 255 of 255 remaining
14r. Enter the total amount you paid for vacations for all members of your household in 2021.* ⓘ	<div>2000</div>
14s. Enter the total amount of additional/unusual expenses you incurred defined as acceptable below.*	<div>0</div>

Additional Expenses are defined as major, costs for non-routine situations. Be prepared that a school may ask you to verify any expenses you report here with copies of bills or receipts.

List of additional expenses to include:

- Nursing home/assisted living care
- Current legal fees
- Closing costs for home purchases or refinancing
- Sewer, street, and water assessments (installation only)
- Unreimbursed tuition for parents
- Uninsured natural disasters
- Special costs for a child with a disability
- Funeral expenses
- Union Dues

List of additional expenses to NOT include:

- Anything covered in other questions (mortgages, consumer purchases, retirement plans, debt, charity or church contributions, child support)
- Fees for Child Care Programs
- Car payments

14t. Itemize the expenses here.* ⓘ

255 of 255 remaining

Cancel

Save & Exit

Save & Next

Business/Farm

Business/Farm

15.1. Business 1 - Information

Cancel

Save & Exit

Save & Next

You may be asked by the school to provide additional documentation regarding your business(es) and/or farm(s), such as a Schedule C included with your IRS form 1040.

15a. Name of Business	Make Room for Escapism
15b. Is this a Business or a Farm?	Business
15c. Business Type	Sole Proprietorship
15e. Indicate the owner(s) of the business or farm*	Both
15f. Year Business or Farm Operation Began	2020
15g. Is this business or farm currently operating?	Yes
15h. Business Address (Street)	1213 Fun St
15i. City	Clearwater
15j. State	FL
15k. Zip Code	19056
15l. Describe the service or product of your business or farm	Escape rooms and other related entertainment

211 of 255 remaining

Cancel

Save & Exit

Save & Next

Business/Farm

16.1. Make Room for Escapism - Income

Cancel

Save & Exit

Save & Next

You may be asked by the school to provide additional documentation regarding your business(es) and/or farm(s), such as a Schedule C included with your IRS form 1040.

Please enter 0 if the question is not applicable.

	2021 (Actual)	2022 (Estimated)
16a. Gross receipts and sales (Do not include returns and allowances)	57,000	90,000
16b. Cost of goods sold and/or operations (Do not include any amount that is listed under business or farm expenses)	48,000	52,000
16c. Gross profit:	\$9,000	\$38,000
16d. Other business or farm income	0	0
16e. Total business or farm income:	\$9,000	\$38,000

Cancel

Save & Exit

Save & Next

17.1. Make Room for Escapism - Expenses

Cancel

Save & Exit

Save & Next

You may be asked by the school to provide additional documentation regarding your business(es) and/or farm(s), such as a Schedule C included with your IRS form 1040.

Please enter 0 if the question is not applicable.

	2021 (Actual)	2022 (Estimated)
17a. Salary/wages paid to you and your spouse (Include only salary you pay yourself. Do not include profit or loss from your business or farm). ¹	<input type="text" value="12,000"/>	<input type="text" value="20,000"/>
17b. Other wages ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
17c. Additional compensation ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
17d. Business property rent ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
17e. Business property mortgage ¹	<input type="text" value="22,000"/>	<input type="text" value="22,000"/>
17f. Depreciation ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
17g. Other business or farm expenses ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
17h. Explanation of other business or farm expenses ¹	252 of 255 remaining <input type="text" value="N/A"/>	
17i. Total business or farm expenses (sum of items 17a through 17g)	\$34,000	\$42,000
17j. Enter the amount you paid/will pay for self-employment tax ¹	<input type="text" value="2,500"/>	<input type="text" value="2,500"/>
17k. Total net profit/loss for this business (16e minus 17i)	(\$25,000)	(\$4,000)
17l. Your share for the profit/loss of this business. ¹	(\$25,000)	(\$4,000)

Cancel

Save & Exit

Save & Next

18.1. Make Room for Escapism - Assets & Debts

Cancel

Save & Exit

Save & Next

You may be asked by the school to provide additional documentation regarding your business(es) and/or farm(s), such as a Schedule C included with your IRS form 1040.

Please enter 0 if the question is not applicable.

	2021 (Actual)	2022 (Estimated)
18a. Current business or farm assets (include total cash of business or farm accounts and other current business or farm assets) minus amount reserved for bad debts	<input type="text" value="10,000"/>	<input type="text" value="20,000"/>
18b. Land and buildings (Give present market value, do not include personal residence.)	<input type="text" value="357,000"/>	<input type="text" value="357,000"/>
18c. Cash reserve for depreciation	<input type="text" value="0"/>	<input type="text" value="0"/>
18d. Other capital assets of the business or farm ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
18e. Accounts receivable (business or farm accounts)	<input type="text" value="0"/>	<input type="text" value="0"/>
18f. Other business or farm assets. ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
18g. Total assets: ¹	\$367,000	\$377,000
Business and/or Farm Debts		
18h. Mortgage on land and buildings (If your personal residence is part of your business or farm, do not enter the home's market value and home mortgage here.)	<input type="text" value="333,000"/>	<input type="text" value="317,000"/>
18i. Debts on equipment and machinery	<input type="text" value="0"/>	<input type="text" value="0"/>
18j. Other business or farm debts ¹	<input type="text" value="0"/>	<input type="text" value="0"/>
18k. Total debts: ¹	\$333,000	\$317,000

Cancel

Save & Exit

Save & Next

19. Business/Farm Summary

Cancel

Save & Exit

Save & Next

Businesses - Sole Proprietorship	Total Income	Total Expenses	Net Profit/Loss	Your Share
Make Room for Escapism - Sole Proprietorship	\$9,000	\$34,000	(\$25,000)	(\$25,000)
Totals	\$9,000	\$34,000	(\$25,000)	(\$25,000)

Cancel

Save & Exit

Save & Next

Monthly Income and Expenses

This is an optional PFS section. For schools that select “Yes” on their Annual Settings to add this MIE, this section is required for all families to complete. For schools that do not make it a global requirement, the MIE can be added on a per student folder basis to request the family to complete the MIE.

Monthly Income and Expenses

MIE1. Monthly Income and Expense Statement

Cancel

Save & Exit

Save & Next

Monthly Income

Parents'/Guardians' take-home pay after taxes and deductions.* ⓘ	<input type="text" value="6000"/>	Alimony payments* ⓘ	<input type="text" value="0"/>
Applicants' and dependents' take-home pay after taxes and deductions.* ⓘ	<input type="text" value="0"/>	Child Support payments* ⓘ	<input type="text" value="0"/>
Alimony received ⓘ	<input type="text" value="0"/>	Other	<input type="text"/>
Child Support received ⓘ	<input type="text" value="0"/>	Total	<input type="text" value="0"/>
Other	<input type="text"/>		
Total	<input type="text" value="6000.00"/>		

Monthly Support Expenses

Monthly Housing Expenses

Mortgage/Rent for primary residence* ⓘ	<input type="text" value="1700"/>	Tuition* ⓘ	<input type="text" value="250"/>
Utilities* ⓘ	<input type="text" value="100"/>	Childcare* ⓘ	<input type="text" value="0"/>
Property Taxes* ⓘ	<input type="text" value="0"/>	Other ⓘ	<input type="text" value="150"/>
Homeowner's or Renter's Insurance* ⓘ	<input type="text" value="0"/>	Please Explain* ⓘ	<input type="text" value="Tutor"/>
Association Fees* ⓘ	<input type="text" value="0"/>	Total	<input type="text" value="400.00"/>
Maintenance* ⓘ	<input type="text" value="100"/>		
Mortgage/Rent for all other properties* ⓘ	<input type="text" value="1600"/>		
Other	<input type="text"/>		
Total	<input type="text" value="3500.00"/>		

Monthly Tuition/Childcare Expenses

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Monthly Vehicle Expenses

Payments* ⁱ	<input type="text" value="500"/>	Health/Medical Insurance Premiums* ⁱ	<input type="text" value="250"/>
Insurance* ⁱ	<input type="text" value="120"/>	Dental Insurance Premiums* ⁱ	<input type="text" value="12"/>
Maintenance and repairs* ⁱ	<input type="text" value="0"/>	Life Insurance Premiums* ⁱ	<input type="text" value="10"/>
Other	<input type="text"/>	Out-of-pocket expenses not covered by insurance* ⁱ	<input type="text" value="0"/>
Total	<input type="text" value="620.00"/>	Other	<input type="text"/>
		Total	<input type="text" value="272.00"/>

Monthly Food Expenses

Groceries* ⁱ	<input type="text" value="300"/>	Clothing* ⁱ	<input type="text" value="50"/>
Dining out* ⁱ	<input type="text" value="100"/>	Pet care* ⁱ	<input type="text" value="100"/>
Other	<input type="text"/>	Bus/Metro/Rail* ⁱ	<input type="text" value="0"/>
Total	<input type="text" value="400.00"/>	Savings* ⁱ	<input type="text" value="100"/>
		Entertainment* ⁱ	<input type="text" value="150"/>
		Travel Expenses* ⁱ	<input type="text" value="0"/>
		Student Loan Payments* ⁱ	<input type="text" value="0"/>
		Other	<input type="text"/>
		Total	<input type="text" value="400.00"/>

Monthly Debt Payments

Retirement Savings* ⁱ	<input type="text" value="0"/>
Debt Payments* ⁱ	<input type="text" value="300"/>
Itemized Debt Payments* ⁱ	<input type="text" value="\$300 - CC"/>
Total	<input type="text" value="300.00"/>

MIE Summary

Monthly Total Income	\$6,000
Monthly Total Expenses	\$5,892
Monthly Net Income	\$108

MIE Explanation

MIE Explanation ⁱ

5000 of 5000 remaining

Cancel

Save & Exit

Save & Next

Other Information

Other Information

20. Other Considerations

Cancel

Save & Exit

Save & Next

4948 of 5000 remaining

20a. Use this space to tell schools any additional information you were not able to cover in the questions you answered.

I would love to type something here, but I am tired.

Cancel

Save & Exit

Save & Next

Additional Questions

This is an optional PFS section. For schools that select "Yes" on their Annual Settings to add supplemental questions, they may select up to 3 additional questions to add to the PFS for their families. Additional questions can be optional or required as set by the school. The default setting is required.

Other Information

21. Additional Questions

Cancel

Save & Exit

Save & Next

▼ Additional Questions

DO NOT APPLY Test School - Supplemental Questions

Does your child receive a scholarship from an outside organization? If so, please provide the name of the organization/scholarship and the amount received.

No

498 of 500 remaining

Have you applied to any outside organization for assistance with your child's tuition?

No

498 of 500 remaining

Have you received any funds from an outside organization within the past three years for your child's education? If so, detail the year, organization and amount received.

No

498 of 500 remaining

TADS Test School 1 - Supplemental Questions

Does your child receive a scholarship from an outside organization? If so, please provide the name of the organization/scholarship and the amount received.*

No

498 of 500 remaining

Have you applied to any outside organization for assistance with your child's tuition?

No

498 of 500 remaining

Have you received any funds from an outside organization within the past three years for your child's education? If so, detail the year, organization and amount received.*

No

498 of 500 remaining

Cancel

Save & Exit

Save & Next

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