Dear Parents,

We hope you had a blessed Christmas season with your family and are enjoying the start of 2020. We are thankful that your family has chosen to invest in a Catholic education for your children in the Diocese of Sioux City.

With the new year, we also look forward to registration and scholarship applications for next school year, 2020-21. We will be continuing our partnership with our scholarship program administrator, TADS, out of Minneapolis, MN.

Attached, you will find application instructions, and other valuable information about TADS and our scholarship program. Please contact your local school, or TADS at 1-800-477-8237 with any questions about the process or the application itself.

Again, thank you for choosing a Catholic education for your children. It is one of the best investments you will make in their faith and their future. Peace and blessings in this new year and always.

Sincerely,

Patty Lansink, Superintendent
Diocese of Sioux City Catholic Schools
2020/2021 TADS Information for Parents

- At Gehlen Catholic, we are happy to assist you with the application process. If you do not have Internet access to complete this application online, please call Amy Jungers at 712-546-4181 ext. 237 at the school for assistance.

- The application fee for each family remains at $23. If this fee is cost prohibitive for your family, please contact Amy Jungers.

- Gehlen suggests having your application in by March 15, 2020. This allows TADS time to notify you if there are any missing materials. The TADS application deadline is no later than April 1, 2020. The application is available online at www.mytads.com in both English and Spanish. In addition to your completed application, you must include your 2019 tax return and other required income documentation. See the attached flyer from TADS for specific requirements.

- To assist you in completing the application, you may contact the TADS call center at 1.800.477.8237 Monday-Friday from 7:00 AM-8:00 PM CST and Saturday 9:00 AM-4:00 PM or email support@tads.com. The TADS online application also has a chat feature to assist parents.

- Award notification letters will be mailed in mid-May. The complete timeline with specific information concerning the application is found below.

  February 1: Applications available online at www.mytads.com

  April 1: Submitted applications must be filed electronically by April 1. All other required tax documents must be submitted electronically by April 22. Applications with missing information cannot be processed.

  Mid-May: Award notification letters sent to all families who applied.

- We strongly encourage every family to complete an application. The Diocesan Financial Scholarship coupled with our local tuition assistance program will be able to make Catholic Education affordable for all.

- If you have questions about the assistance program, contact the school at 712-546-4181 ext. 237 or ajungers@gehlen catholic.org. Contact the TADS call center at 1.800.477.8237 with specific questions about the application. This is a wonderful opportunity for qualifying families.

- An FAQ document is enclosed that provides further information about common questions.
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
- 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, 2019, even if no longer at this job

<table>
<thead>
<tr>
<th>1. Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Wages, Tips, Other Compensation</td>
</tr>
<tr>
<td>3. 2019 Estimated Wages, Tips, Other Compensation</td>
</tr>
</tbody>
</table>

If Parents/Guardians have held more than four jobs since January 1, 2019, please see your financial aid administrator for an addendum.

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

4. 2019 Wages, Tips, Other Compensation: This value can be found in Box 1 of your 2019 W-2. If you do not have your 2019 W-2 yet, use the year-to-date total off of your last December 2019 paycheck. You may fax the W-2 in later as long as it is before the application deadline.

5. 2020 Estimated Wages, Tips, Other Compensation for this job: If you estimate that your 2020 income from a job will be lower than 2019 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, 2019

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 Field Z. Find Line Z on the Partnership Form 1065 and enter that number into 5. 2019 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 required if you submitted tax documentation to the federal government for the following group:

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

#### 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: S. Line 26, 6. Leave blank
- Corporation - Form 1120: S. Line 30, 6. Leave blank
- S Corporation - Form 1120S: S. Line 21, 6. Leave blank

### SECTION 5 Other Monthly Income

<table>
<thead>
<tr>
<th>1. Welfare Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Food Stamps</td>
</tr>
<tr>
<td>3. Parent(s)/Guardian(s)</td>
</tr>
<tr>
<td>4. Dependents under 19</td>
</tr>
<tr>
<td>5. Elderly Dependents</td>
</tr>
</tbody>
</table>

This is a worksheet to help prepare you to fill out the TADS Financial Aid application and will not be accepted by TADS as an application. Do not send this form to TADS or your school.

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SECTION 6 Other Yearly Income

1. 2019 Interest & Dividends: This value is found by adding lines 2a, 2b, and 3b on your 1040 tax return form. 
6. and 7. Include any income that is not accounted for elsewhere on this application.

1. 2019 Interest & Dividends

Yearly Workers’ Compensation
2. Actual 2019

5. Estimated 2020

3. Estimated 2020

Yearly Unemployment 4.
Actual 2019

Miscellaneous Yearly Income 6. 2019 Lump Sum

7. Recurring Yearly

SECTION 7 If You Pay Rent

Enter the amount you pay for rent alone; do not include utility expenses unless they are built into your monthly rental payments.

1. Monthly Rent

2. YearlyRenters’ Insurance

If you rent, do not include these expenses if they are already included in monthly rental payments. Homeowners should report expenses.

1. Monthly Rent

2. YearlyRenters’ Insurance

SECTION 8 Yearly Energy Expenses (renters and homeowners)

1. Electricity

2. Gas, Oil, Coal

3. Water, Sewage

SECTION 9 Assets and Expenses – Home

Fill out this section if you are a homeowner.
4. Current Market Value: If you have not had a recent appraisal on your property, use the most recent Real Estate Tax Assessment.
5. Amount Owed on Home Loans/Mortgages: Make sure to include any second mortgages in this figure.
10. 2019 Rental Income: Include rent or mortgage contributions from others living in home.

1. Year of Purchase

2. Purchase Price

3. Improvements/Additions

4. Current Market Value

5. Amount Owed on Home Loans/Mortgages

6. Monthly Mortgage Payment

7. 2019 Property Tax

8. 2019 Home Insurance

10. 2019 Rental Income (if not a single family dwelling)

11. 2019 Rental Expenses (if not a single family dwelling)

SECTION 10 Assets and Expenses – Real Estate other than Home

Fill out this section if you own any other properties in addition to your home, including rental properties, land, etc.
4. Current Market Value: If you have not had recent appraisals done on your properties, use the most recent Real Estate Tax Assessments.
6. Total Monthly Loan/Mortgage Payment: List total monthly mortgage or loan payments for all properties other than home.
7. 2019 Gross Property Income: List the total yearly gross income for properties other than home.
8. 2019 Gross Property Expenses: List total expenses for properties. Do not include principal paid on loan or mortgage amounts.

1. Number of Properties

2. Purchase Price of all Properties

3. Cost of Improvements/Additions

4. Current Market Value

5. Amount Owed for all Properties

6. Total Monthly Loan/Mortgage Payment

7. 2019 Gross Property Income

8. 2019 Gross Property Expenses

SECTION 11 Assets and Debt – Automobiles

Please enter market value and current debt for the vehicles that you own in items 1, 2, and 3, and requested information for the vehicles that you are leasing in 4. and 5.
6. Yearly Total of Vehicle Insurance Cost: Please enter the yearly cost of insurance for all vehicles that you either own or lease.

<table>
<thead>
<tr>
<th>Information for vehicles that you own</th>
<th>Information for vehicles that you lease</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. # of Vehicles</td>
<td>1. # of Vehicles</td>
</tr>
<tr>
<td>2. Total Current Market Value</td>
<td>2. Total Monthly Lease</td>
</tr>
<tr>
<td>3. Total Debt</td>
<td>3. Total Debt</td>
</tr>
</tbody>
</table>

6. Yearly Insurance Cost for All Vehicles

This is a worksheet to help prepare you to fill out the TADS Financial Aid application and will not be accepted by TADS as an application. Do not send this form to TADS or your school.
### 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. 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 2019 contributions are still pending, please estimate total.
2. 2019 Contribution – Households: Enter the total amount that Parents/Guardians contributed towards these funds during 2019. If year 2019 contributions are still pending, please estimate total.
3. 2019 Contribution – Employer: Enter the total amount that employers of Parents/Guardians contributed toward these funds during 2019. If year 2019 contributions are still pending, please estimate total.

### SECTION 15 Medical Expenses
1. Payments Made in 2019 (Medical/Dental)
2. Current Medical Debt (Medical/Dental)
3. Annual Insurance Premiums (Medical/Dental)
4. Prescription Drugs
5. Prescription Eyewear

### SECTION 16 Alimony and Child Support Expenses
3. Estimated Child Support to be paid to Others (2020)
4. Alimony/Paid to Others (2019)
5. Estimated Alimony to be paid to others (2020)

### SECTION 17 Day Care and/or Elderly Care Expenses (include summer camp expenses)
1. Dependent Name
2. 2019 Payments
3. Estimated 2020 Payments

### SECTION 18 Charitable Giving (list your three largest contributions)
1. Charity Name
2. 2019 Contributions

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This is a worksheet to help prepare you to fill out the TADS Financial Aid application and will not be accepted by TADS as an application. Do not send this form to TADS or your school.
SECTION 19 Miscellaneous Debt (do not list debt on home or property, medical debt, debt for cars, boats, or other vehicles)

List the total outstanding dollar amount in each item. Do not include medical debt, vehicle debt, home loans, second mortgages or home equity loans. If you have more than one credit card, add all card balances together and enter the total amount.

Documentation of any debt may be required.

5. Education – Dependents: List the total amount of education debt owed for dependents. Do not include dependent’s tuition amount for the 2020-21 school year, list this amount online in Section 22.

7. Other Debt: List the amount of debt excluding all other debt previously listed.

SECTION 21 Contributions to Education (2020-2021)

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 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 Parent(s)/Guardians in this section.

7. Dependent Earnings in 2019: If a dependent held a job in 2019, list the earnings in this section. Do not list Social Security income or earnings from stocks, securities, etc.

8. Dependent Current Savings: Do not include 529 College Savings Plans in this figure.

9. 529 Savings Plan: If the dependent has a 529 College Savings Plan include the total amount saved here.

10. Amount Dependent Can Contribute: If a dependent is working or has savings, most schools will expect the dependent to contribute something toward his/her own education. What do you think is reasonable for this dependent to contribute?

11. Expenses – Bus, Books, Uniforms, etc.: Include expenses that the school requires you to pay outside of tuition costs. Do not include optional expenses such as fees to play sports or fees for other extracurricular activities, or expenses such as lunch or gas.

This is a worksheet to help prepare you to fill out the TADS Financial Aid application and will not be accepted by TADS as an application. Do not send this form to TADS or your school.

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

WORKSHEET
DO NOT SUBMIT

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.secure.tads.com and click on the icon for live help. You will be connected to a TADS

E-mail: representative.tads-support@communitybrands.com

Toll-free: 1.800.477.8237 We are available Monday through Friday, 7:00 a.m. to 8:00 p.m. Central Time.

Telephone: 612.548.3320 We are available Monday through Friday, 7:00 a.m. to 8:00 p.m. Central Time.

Fax Number: 612.548.3326

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<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How is income eligibility determined?</strong></td>
<td>Your income determines if you are eligible for one of the Diocese of Sioux City Scholarship Programs. To qualify for these programs TADS will look at Line 7b from your most current tax return and will use the income eligibility chart that is provided to determine eligibility.</td>
</tr>
<tr>
<td><strong>Income eligibility guidelines</strong></td>
<td>A chart of the current income guidelines can be found at <a href="http://www.scdioocese.org">www.scdioocese.org</a>. For the 2020-2021 school year a family of four, with total income at or below $91,700, could qualify for a MLTF award. A family of four, with a total income at or below $157,200 could qualify for a Diocesan Scholarship award. Income eligibility tables will be effective for the 2020-2021 school year.</td>
</tr>
<tr>
<td><strong>Is there any other criteria to qualify?</strong></td>
<td>To qualify for a MLTF scholarship the family must be an Iowa resident and the student must be age 5 by Sept 15th and in a certified program. Additional scholarship funds are available for K-12 students with family incomes within the published income guidelines as discussed above.</td>
</tr>
<tr>
<td><strong>How do I apply for tuition assistance?</strong></td>
<td>The Diocese of Sioux City Scholarship Program applications must be submitted online at <a href="http://www.mytads.com">www.mytads.com</a>. The online application link is available on your local schools website as well as the Catholic schools office website at <a href="http://www.sccatholicschools.org">www.sccatholicschools.org</a>. Please contact your local school if you need assistance.</td>
</tr>
<tr>
<td><strong>What if I don’t have internet access to complete an online application?</strong></td>
<td>Parents can contact their local school for an individual appointment to use the school’s Internet access to complete an online application.</td>
</tr>
<tr>
<td><strong>Do I have to have an email address to complete the online application?</strong></td>
<td>Email is the primary way TADS communicates with parents who have applied. We strongly recommend you provide a working email address that is closely monitored in order to receive these communications. Please contact your school rep if you need assistance establishing an email account. If you’ve used the TADS application previously we recommend using the same email address as your login to access your existing information. Parents are strongly encouraged to monitor their email for communications from TADS.</td>
</tr>
<tr>
<td><strong>When is the application open?</strong></td>
<td>The online application is open beginning February 1, 2020. The application is available in English and Spanish.</td>
</tr>
<tr>
<td><strong>Do I need to fill out an application for each of my children?</strong></td>
<td>No, only one application per household is required. Be sure to include all children on this application.</td>
</tr>
</tbody>
</table>
| **When are applications due? When will we be notified?**               | **1st round:** Application due April 1st Letters sent to parent in mid-May Enrollment/parish registration verified by schools in early September Funds sent to schools in mid-October  
**2nd round (new students only):** Application due September 15th Enrollment/parish registration verified by schools in early October Letters sent to parent in mid-October Funds sent to schools in mid-November |
<p>| <strong>Do Foreign Exchange Students qualify?</strong>                               | Residence in Iowa is temporary for foreign exchange students therefore they would not qualify for any Diocesan assistance.                                                                                                                                         |
| <strong>How should divorced parents apply?</strong>                                 | In the case of divorced parents, the tuition responsibility of each parent should be indicated on the application. (ex: 50-50 split on tuition then award is based on 50% of tuition). Tuition assistance awarded to one parent cannot be split between the parents. If divorced parents each pay a portion of the tuition bill, then each household needs to complete an application for a possible award towards their portion of tuition. |</p>
<table>
<thead>
<tr>
<th><strong>How should guardians apply?</strong></th>
<th>Applications for students residing with a grandparent or guardian should be filled out by the individual who claims the student(s) on a tax return. TADS will use that tax return to determine eligibility and need.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How should foster parents apply?</strong></td>
<td>Families with foster children in their home should complete a separate application with just those children listed on it. Any income such as state subsidies should be included; however, no expenses need to be listed. The application should exclude all financial information of the parents and the foster parents.</td>
</tr>
<tr>
<td><strong>What if the application fee is cost prohibitive for my family?</strong></td>
<td>If the application fee is cost prohibitive, you are encouraged to contact the school to request that they pay the fee on your behalf.</td>
</tr>
<tr>
<td><strong>Are Special financial circumstances considered?</strong></td>
<td>Families experiencing a hardship are to be evaluated by TADS during review of the application. The diocesan award amounts as recommended by TADS cannot be altered by Diocesan staff or school representatives due to financial hardships.</td>
</tr>
<tr>
<td><strong>What if parents were not required to file taxes?</strong></td>
<td>Those families who were not required to file taxes will need to complete the Verification of Non-Filing form (VNF). Copies of all supporting documentation for household non-taxable income such as Social Security income, Child support, Food stamps, Workers’ compensation, and Temporary Assistance for Needy Families (TANF) are required to be submitted.</td>
</tr>
<tr>
<td><strong>What if I have questions about how to complete the application?</strong></td>
<td>TADS is happy to assist families with questions about completing their applications. You may reach TADS staff at 1-800-477-8237, Monday - Friday 7:00am - 8:00pm CST and Saturday 9:00am - 4:00pm CST. TADS staff are also available through live chat on their website at <a href="http://www.mytads.com">www.mytads.com</a> or by email at <a href="mailto:support@tads.com">support@tads.com</a>. You may also contact your school for additional assistance.</td>
</tr>
<tr>
<td><strong>Is the Diocese of Sioux City Scholarship Program the only assistance available?</strong></td>
<td>Many schools have local assistance programs to supplement the Diocese of Sioux City Scholarship Program awards. Generally families must first complete an application with TADS as a prerequisite to applying for local assistance. Local assistance programs, however, can create their own income guidelines or consideration of special circumstances.</td>
</tr>
<tr>
<td><strong>What if the award my family receives is not enough?</strong></td>
<td>The Diocese of Sioux City Scholarship Program awards cannot be appealed by parents as the income guidelines are set by state law and the proportion of funds available for each family is based on the overall need of qualifying applicants. If you feel you need additional funds to supplement your award, you are strongly encouraged to contact your local school/parish about local assistance programs and any other opportunities for assistance.</td>
</tr>
<tr>
<td><strong>Can an application be withdrawn?</strong></td>
<td>Applicants who choose to withdraw their application for financial aid must communicate directly with TADS their decision to withdraw. Neither school representatives or Diocesan staff can make this request.</td>
</tr>
</tbody>
</table>