

## Scholarship Application (High School Applicants ONLY)

IF THERE IS INSUFFICIENT SPACE ON ANY SCHEDULE, PLEASE ATTACH SEPARATE PAGE IN SIMILAR DETAIL.

All Scholarship applicants should complete this document. The Stern scholarship's mission is to help offset the costs of a Catholic education and is awarded to students/families that demonstrate a financial need.

### PERSONAL INFORMATION

<b>Student:</b>		Expected Graduation Date:	
Name of Catholic High School in Ozaukee or Milwaukee County:			
Tuition for the Year:		Tuition Assistance/Financial aid already received/anticipated:	
Other family members high school/grade school tuition:			
<b>Father</b>		<b>Mother</b>	
FULL NAME		FULL NAME	
STREET ADDRESS		STREET ADDRESS	
CITY/STATE/ZIP		CITY/STATE/ZIP	
PHONE: RESIDENCE	PHONE: WORK	PHONE: RESIDENCE	PHONE: WORK
PHONE: CELL	EMAIL	PHONE: CELL	EMAIL
EMPLOYER		EMPLOYER	
ADDRESS		ADDRESS	
POSITION/TITLE	SINCE	POSITION/TITLE	SINCE
NUMBER OF DEPENDENTS (INCLUDE SELF)		NUMBER OF DEPENDENTS (INCLUDE SELF)	
MARITAL STATUS* <input type="checkbox"/> UNMARRIED <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED		MARITAL STATUS* <input type="checkbox"/> UNMARRIED <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED	

# PERSONAL BALANCE SHEET

- » List all assets and liabilities of both parents
- » If a separate schedule of assets and liabilities is attached, the schedule must be signed and dated and include similar detail as requested below.
- » Assets and liabilities of one party only should be listed under the appropriate parent's column. Assets and liabilities of both parties jointly or other owner-ships, should be listed under the Joint/Trust/Other Column.

**HOW HELD CODES**    **IO = INDIVIDUALLY OWNERSHIP**    **JT = JOINTLY OWNED**    **TR = HELD IN TRUST**    **OT = OTHER**

DATE VALUATIONS _____	Father	Mother	JOINT/TRUST/ OTHER
<b>ASSETS</b>	\$ AMOUNT	\$ AMOUNT	\$ AMOUNT
CASH      Held at Bank			
Held Elsewhere (INCLUDE IN SCHEDULE 1)			
SECURITIES      Marketable (INCLUDE IN SCHEDULE 2)			
Non-marketable (INCLUDE IN SCHEDULE 2)			
Restricted or Controlled (INCLUDE IN SCHEDULE 2)			
LIFE INSURANCE CASH VALUE (SCHEDULE 3)			
INVESTMENTS      Closely Held Companies (INCLUDE IN SCHEDULE 4)			
Partnership Interests (INCLUDE IN SCHEDULE 4)			
Privately Owned Business (INCLUDE IN SCHEDULE 4)			
REAL ESTATE      Primary Residence (INCLUDE IN SCHEDULE 5)			
Other Residences (INCLUDE IN SCHEDULE 5)			
Investment (INCLUDE IN SCHEDULE 5)			
Partial Interest (INCLUDE IN SCHEDULE 5)			
NOTES AND OTHER RECEIVABLES (INCLUDE IN SCHEDULE 6)			
RETIREMENT ACCOUNTS (INCLUDE IN SCHEDULE 7)			
AUTOMOBILES			
OTHER PERSONAL ASSETS (Itemize below or attach additional pages as needed)			
<b>TOTAL ASSETS</b>			
<b>LIABILITIES</b> (INCLUDE IN SCHEDULE 8)			
UNSECURED LOANS      Owed			
SECURED    LOANS      Owed			
Owed to Other Financial Institutions OTHER LOANS &			
LEASES PAYABLE			
CREDIT CARD BALANCES			
DUE TO BROKERS (INCLUDE IN SCHEDULE 9)			
MORTGAGE      Primary Residence			
Other Residence			
Investment			
Partial Interest			
TAXES      Income Taxes			
Other Taxes (INCLUDE IN SCHEDULE 9)			
DUE ON AUTOMOBILES			
OTHER LIABILITIES (Itemize below or attach additional pages as needed)			
<b>TOTAL LIABILITIES</b>			
<b>NET WORTH</b> (Total assets minus total liabilities)			

**PERSONAL CASH FLOW STATEMENT**

INCOME	LAST YEAR	CURRENT YEAR	LAST YEAR	CURRENT YEAR
Salary & Wages (amount reported on W2) or Professional Net Income				
Bonus & Commissions				
Interest & Dividends				
Net Rental Income <i>(INCLUDE IN SCHEDULE 5)</i>				
Business Income or Loss				
Trust Distributions				
Pension, Annuity & Social Security Income				
Other Income (Itemize below or attach additional pages as needed)				
<b>TOTAL ANNUAL INCOME</b>				

**PRIMARY RESIDENCE**

1st Mortgage Payment				
2nd Mortgage Payment				
Real Estate Taxes				
Mortgage Insurance				
Homeowner's Insurance				
Flood Insurance				
Association Fees				
<b>TOTAL PRIMARY RESIDENCE PITI</b>				

**OTHER REAL ESTATE**

1st Mortgage Payment				
2nd Mortgage Payment				
Real Estate Taxes				
Mortgage Insurance				
Homeowner's Insurance				
Flood Insurance				
Association Fees				
<b>OTHER REAL ESTATE PITI</b>				

**OTHER EXPENSES**

Credit Card Payments				
Rental Payments				
Interest & Principal Payment on Loans				
Insurance Premiums				
Investments				
Alimony, Child Support & Tuition*				
Education Expenses				
Other Expenses (Itemize below or attach additional pages as needed)				

<b>TOTAL ANNUAL EXPENSES</b>				
<b>CASH FLOW SURPLUS (DEFICIT)</b>				

\* Inclusion of alimony, separate maintenance, or child support as income is voluntary and need not be revealed, if you do not wish to have it considered. If you choose to include these payments, please state the dollar amount and name and address of the person obligated to pay that amount to you. If you are responsible for paying alimony, separate maintenance, or child support, please provide details of that obligation, along with your other obligations.

## CHANGES ANTICIPATED

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Do you anticipate any material changes to the reported financial information within the next year? If yes, please explain below:

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Father's Signature (if applicable)

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DATE

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Mother's Signature (if applicable)

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DATE

**Please include the supporting documents along with your application:**

- Most recent tax return or W-2
- Tuition Bill(s)