The Mirman School for Gifted Children
16180 Mulholland Drive
Los Angeles, CA 90049
Business Office (310) 775-8405
Confidential Fax (310) 476-5869

Financial Aid Application

2011-2012

Application Due Date: February 28, 2011

Applications for financial aid must be received by February 28, 2011. Incomplete files may not be considered or may receive smaller grants after March 1, 2011.

About Financial Aid

Summary
The Mirman School is committed to academic excellence and to a student body that represents a wide range of socio-economic diversity. To support these commitments, the School provides financial assistance to families of gifted children with demonstrated financial need. The School assesses financial need by asking parents to complete this Financial Aid Application and to enter your information on the School and Student Services for Financial Aid website (SSS). The School's Financial Aid Committee reviews all applications and awards grants based on information provided.

Financial Aid Policy
For your reference, the financial aid policy for the school has been included on pages 7 and 8 of the application.

Due Dates for Forms
Financial Aid forms are available as of December 15, 2010. All forms are due no later than **February 28, 2011**. For families submitting timely applications, a one-week grace period to March 1, 2011 will be granted to turn in missing paperwork. Late or incomplete files may not be accepted. If considered, late applications are evaluated last and generally receive only partial grants.

The School is aware that some families may have difficulty preparing their tax return by the School's published deadlines for reasons beyond a family's control. While the School is sympathetic to the problem this presents, the School cannot make exceptions to its financial aid deadlines to accommodate tax filing problems. The reasons for this are the need to consider all grant requests together and the limitation of available funds. It is not possible to hold funds for families with incomplete applications and once funds are expended, no additional consideration can be given.

School and Student Services for Financial Aid (SSS Form)
In an effort to handle the information received from parents in the most efficient manner, the School now requires that you submit your financial information to SSS online at www.sss.nais.org. In addition, you are now required to submit your 2011-2012 Mirman School Financial Aid application and your 2010 federal and state tax return to SSS. SSS will scan the return, keep the information on a secure server and we will use the information to verify information submitted in the SSS application. Supporting information should be sent to SSS using the cover sheet that they provide on-line.

Limited Funds
The School is committed to assisting families with financial need; however, as funds are limited, the School cannot guarantee to meet the needs of all financial aid applicants.

Divorced or Separated Parents – Parents Who Were Never Married
In the case of divorced or separated parents, both parents must submit financial aid forms; however, marital status is not a consideration in determining financial need. Parents who were never married must also make a complete financial disclosure. Financial responsibility cannot be transferred from one parent to the other for financial aid purposes.

Non-Discrimination Policy
The Mirman School does not discriminate on the basis of sex, race, color, religion, national origin or any other protected category in the creation or implementation of its admissions policies, educational policies, scholarship and loan programs, athletic programs or any other school-administered program, service or privilege.

The Mirman School for Gifted Children

Financial Aid Checklist 2011-2012

Deadline February 28, 2011

Step 1 - Enter the SSS application information online at www.sss.nais.org (Mirman School Code - 1501)

- [ ] Go to www.sss.nais.org to enter family financial information

Step 2 - Following the SSS instructions, please mail the following documents to SSS:

- [ ] The Mirman School Financial Aid Application.
- [ ] Your 2010 Federal Tax Return (Will be maintained on a secure server at SSS and made available to the Mirman School via a secure line over the internet)
- [ ] 2010 State of California tax return
- [ ] IRS form 4506T (signed, but not dated) - May also be obtained from the IRS website: www.irs.gov.

Please Note: Please do not mail or drop off any documents to the Mirman Business Office. Anything received in the office will be returned to you. Thank you for your help with this change in procedure.

Deadline February 28, 2011

The Mirman School

Information Sheet

2011-2012

First Mirman Student Name ______________________ Room/Yr 11-12 __________

Second Mirman Student Name ______________________ Room/Yr 11-12 __________

Third Mirman Student Name ______________________ Room/Yr 11-12 __________

Family Information

Parent #1 - Name ______________________ Occupation __________

Address ______________________ Phone __________

Parent #2 - Name ______________________ Occupation __________

Address ______________________ Phone __________

Children

Name	Age	School	$$ Amount of Financial Aid Request for 11-12 **(required entry)**

The Mirman School

Personal Statement of Assets and Debts

2011-2012

Report appropriate amounts in boxes as of December 31, 2010:			Amount
Cash in Personal Checking Account			1
Cash in Business Checking Account			2
Cash in Savings/Investment Account			3
Market Value:			
Stocks and Bonds			4
Mutual Funds			5
Real Estate:			
Personal Residence			
Cost	6		
Market Value - Compared to Zillow.com		7	
Less 1st Mortgage		8	
Less 2nd Mortgage		9	
Net Equity (Line 7 less lines 8 and 9)			10
2nd Residence (Rental or Other)			
Cost	11		
Market Value - Compared to Zillow.com		12	
Less 1st Mortgage		13	
Less 2nd Mortgage		14	
Net Equity (Line12 less lines 13 and 14)			15
Automobiles:			
Auto #1 - Year/Make/Model______________			
Cost:	16		
Loan Balance			17
Monthly Lease Payment	18		
Market Value			19
Auto #2 - Year/Make/Model______________			
Cost:	20		
Loan Balance			21
Monthly Lease Payment	22		
Market Value			23
Other Assets:			
Boat (Mkt. Value Less Debt)			24
Collections			25
Works of Art			26
Market Value of Trust Funds			27
Beneficiary(ies) _________________________			
Debts (Other than Real Estate Mortgages):			
Credit Card Debt			28
Income Taxes			29
Personal Loans			
#1 Payable to:___________________________			30
#2 Payable to:			31
#3 Payable to:___________________________			32
Business Office Use Only:			33

The Mirman School

Monthly Household Budget

2011-2012

	Monthly Amount
Personal Residence:	
Mortgage Payment	
Homeowner's/Renter's Ins.	
Property Taxes	
Rent	
Housekeeper	
Gardener	
Pool Service	
Utilities	
Other:____________________	
_________________________	
_________________________	
Food:	
Groceries	
Eating Out	
Clothing Budget:	
Auto Expense (do not included business expense):	
Auto #1 - Loan/Lease Payments	
Auto #2 - Loan/Lease Payments	
Gasoline	
Repairs/Service Agreement	
Insurance	
Child Care:	
Live-in Nanny	
In-home child care	
Private Lessons	
Extra classes	

	Monthly Amount
Insurance Expense:	
Medical/Dental	
Disability	
Life Insurance	
Other_________________	
Vacation Expense:	
Annual expense divided by 12	
Educational Expense:	
Tuition________________	
Tuition________________	
Tuition________________	
College Loans__________	
Medical Expense (Un-reimbursed):	
Medical	
Dental	
Vision	
Medicine	
Loans/Credit Cards:	
Loan__________________	
Loan__________________	
Credit Card_____________	
Credit Card_____________	
Other__________________	
Other__________________	
Total Monthly Expenses	

If your monthly expenses exceed your montly net pay, please detail how the deficit is covered.

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Please explain special circumstances that the School's Financial Aid Committee should consider:

The Mirman School
Financial Aid Policy

Through its financial aid program, The Mirman School for Gifted Children seeks to provide access for highly gifted students from diverse socioeconomic and cultural backgrounds in the greater Los Angeles area to a welcoming educational community. The financial aid program provides financial assistance to those who could not otherwise afford to attend the School. Aid is awarded solely on the basis of demonstrated financial need.

To accomplish this task, The Mirman School subscribes to the NAIS (National Association of Independent Schools) Principles of Good Practice in Financial Aid Administration and has incorporated these principles into its school-wide financial aid policy. The following guidelines reflect these principles and have been approved by the School's Board of Trustees.

1 The Finance Committee of the Board of Trustees determines the amount to be allocated to financial aid from the total operating budget. In making this determination, the Finance Committee considers past levels of need, current funding availability, anticipated fundraising efforts, future tuition increases, and the requirements of the overall operating budget. The Board of Trustees reviews and approves the Finance Committee's allocations. Only the Board of Trustees may authorize the allocation of funds for financial aid.

2 The Financial Aid Committee consists of the Headmaster, Assistant Head of School and Chief Financial Officer of the School. The role of the Committee is to collect applications, determine applicant qualifications and authorize grants.

3 Applicants are required to complete, in a timely manner, the School's Financial Aid Application, and the School and Student Service for Financial Aid (SSS) form. Applicants will also be required to submit copies of their prior year Federal and state tax returns, W-2's, three recent paycheck stubs, and a signed, but not dated, IRS form 4506. The Committee reserves the right to request additional information it deems necessary on a case-by-case basis.

4 Applications submitted after the published deadline will not be considered.

5 The Committee will adjust for differences between a family's tax return(s) and its financial aid application.

6 The Committee will keep all aspects of financial aid confidential and will never publish or disseminate applicant names or personal information beyond the Committee.

7 Due to changing financial circumstances from year to year, families must apply annually for financial aid. A grant received in a prior year does not guarantee additional grants in current or future years. However, as long as the family demonstrates financial need, the School will continue to attempt to meet that need.

8 Each year, the Committee gives first priority to the consideration of applications for renewal of financial aid to current aid recipients. The Committee subsequently considers the applications of those applying for aid for the first time.

9 The School does not make loans or grants requiring repayment.

10 Decisions by the Financial Aid Committee are final and not subject to appeal.

11 In determining demonstrated need, the Committee will consider all forms of income, both taxable and non-taxable.

12 The Committee will consider all assets of the family, including trusts and other resources,

regardless of the terms of the documents controlling such entities.

13 It is the policy of the Mirman School that both parents, regardless of marital status, be financially committed to the costs of their child's attendance at the Mirman School. In the case of parents who are divorced or who never married, the Committee will assume that each parent will contribute as necessary to payment of tuition regardless of custody arrangements or court orders.

14 In applying for financial aid, each parent must apply and demonstrate a need. If information from both parents is not available by the application deadline, the Committee may make an independent assessment regarding financial need, which may result in a lesser award or no award at all.

15 If either of a child's natural parents remarries, or resides with a significant other, the financial information submitted to both SSS and the School must include all household income.

16 The Business Office is authorized to accept a reduced enrollment deposit from families applying for financial aid. Should it be determined that a family does not qualify for financial aid, the family will be asked to provide the balance of the deposit.

17 The Business Office is authorized to offer a monthly 10-Payment Plan to families granted financial aid.

18 In addition to the financial aid granted toward tuition, recipients will automatically be granted additional aid on a proportional basis (i.e. at the same percent as the original financial aid granted toward tuition) to cover additional fees as enumerated by the Committee.

19 Families receiving financial aid are expected to be responsible in their financial obligations to the School. The School will withhold re-enrollment contracts and/or aid from financially delinquent families, or from any family that misleads the school as to its need.

Form **4506-T**

(Rev. January 2010)

Department of the Treasury
Internal Revenue Service

Request for Transcript of Tax Return

▶ **Request may be rejected if the form is incomplete or illegible.**

OMB No. 1545-1872

Tip. Use Form 4506-T to order a transcript or other return information free of charge. See the product list below. You can also call 1-800-829-1040 to order a transcript. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.	**1b First social security number on tax return or employer identification number (see instructions)**
2a If a joint return, enter spouse's name shown on tax return.	**2b Second social security number if joint tax return**

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code

4 Previous address shown on the last return filed if different from line 3

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax information.

Mirman School
16180 Mulholland Drive
Los Angeles, CA 90049

Caution. *If the transcript is being mailed to a third party, ensure that you have filled in line 6 and line 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy.*

6 Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ 1040

a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120A, Form 1120H, Form 1120L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days . . . . ☐

b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 30 calendar days. . ☐

c Record of Account, which is a combination of line item information and later adjustments to the account. Available for current year and 3 prior tax years. Most requests will be processed within 30 calendar days . . . . ☐

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days . . ☐

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2007, filed in 2008, will not be available from the IRS until 2009. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 45 days . . . ☐

Caution. *If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.*

9 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately.

12/31/2010 ________ ________ ________

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, **either** husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note.** *For transcripts being sent to a third party, this form must be received within 120 days of signature date.*

Telephone number of taxpayer on line 1a or 2a

Sign Here

Signature (see instructions) — Date

Title (if line 1a above is a corporation, partnership, estate, or trust)

Spouse's signature — Date

General Instructions

Purpose of form. Use Form 4506-T to request tax return information. You can also designate a third party to receive the information. See line 5.

Tip. Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

Where to file. Mail or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different RAIVS teams, send your request to the team based on the address of your most recent return.

Automated transcript request. You can call 1-800-829-1040 to order a transcript through the automated self-help system. Follow prompts for "questions about your tax account" to order a tax return transcript.

Chart for individual transcripts (Form 1040 series and Form W-2)

If you filed an individual return and lived in:	Mail or fax to the "Internal Revenue Service" at:
Florida, Georgia, North Carolina, South Carolina	RAIVS Team P.O. Box 47-421 Stop 91 Doraville, GA 30362 770-455-2335
Alabama, Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301 512-460-2272
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888 559-456-5876
Arkansas, Connecticut, Delaware, District of Columbia, Maine, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, Ohio, Pennsylvania, Rhode Island, Vermont, Virginia, West Virginia	RAIVS Team Stop 6705 P-6 Kansas City, MO 64999 816-292-6102

Chart for all other transcripts

If you lived in or your business was in:	Mail or fax to the "Internal Revenue Service" at:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Tennessee, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409 801-620-6922
Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia, Wisconsin	RAIVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250 859-669-3592

Line 1b. Enter your employer identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Line 6. Enter only one tax form number per request.

Signature and date. Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the information be sent to a third party, the IRS must receive Form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected.

Individuals. Transcripts of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer.

Partnerships. Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

All others. See Internal Revenue Code section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the Letters Testamentary authorizing an individual to act for an estate.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, and the District of Columbia for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form,** 10 min.; **Preparing the form,** 12 min.; and **Copying, assembling, and sending the form to the IRS,** 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to the Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6526, Washington, DC 20224. Do not send the form to this address. Instead, see *Where to file* on this page.