Temple B’nai Shalom

Financial Consideration Application
2017 – 2018

Certification

I/We certify that the information submitted on this application is complete and accurate to the best of my/our knowledge.

I/We understand that this is a confidential process whereby the Temple agrees to keep the information contained in this application private. In turn, I/we agree to not discuss the Financial Consideration process with any member of Temple B’nai Shalom outside of the Financial Consideration Committee.

I/We agree to inform the Financial Consideration Committee (via the Financial Consideration Committee Chair or Treasurer) promptly of any significant changes in my/our financial condition (e.g. purchase/sale of home, major illness, gain or loss of employment, increase or decrease in salary, inheritance, etc.)

Religious School tuition must be paid, in full, at registration. In the event financial assistance with religious school is needed please contact the Executive Director.

Temple B’nai Shalom reserves the right to amend a grant based upon changes in the recipients’ financial condition.

_____

APPLICANT 1 **DATE**

_____

APPLICANT 2 **DATE**

INCOMPLETE APPLICATIONS MAY NOT BE CONSIDERED

Please return completed form to:
Temple B’nai Shalom, 7612 Old Ox Road, Fairfax Station, VA 22039
Attn: Treasurer

Applicant Information

Applicant 1 Name _____

Applicant 2 Name _____

Family Status of applicant(s):

___ Married/Partnered/Engaged
___ Separated (date of separation _____)
___ Divorced
___ Widow/Widower
___ Single

Home Address _____

_____

Home Phone _____
Cell Phone(s) _____
Email (s) _____

Dependents/Ages _____ _____
_____ _____

Please list the name and email of the applicant the Financial Consideration Committee should contact if the committee has questions:

_____
Name Email

Applicant 1

Occupation _____
Employer _____
Years employed with this employer _____
Self Employed _____

If unemployed, Date last employed _____

Applicant 2

Occupation _____
Employer _____
Years employed with this employer _____
Self Employed _____

If unemployed, Date last employed _____

Income, Benefits and Assets for Calendar Year 2017

Married/partnered/engaged applicants are required to submit financial information for both applicants, even if one is not an active member or is not Jewish.

	Applicant 1 ($)	**Applicant 2 ($)**	**Total ($)**
2016 Calendar Year Gross Family Income (Form 1040, line 22 or Form 1040A, line 15) – not Adjusted Gross Income			
Compensation from employment, including self-employed income.			
Amount of yearly contributions to IRAs, SEPs or other retirement, savings or pension plans.			
Child Support Received			
Untaxed Social Security Benefits or other payments received.			
Value of Liquid Assets (Cash, Savings, Checking, Annuities, Other)			
Value of Other Assets and Investments (for example real property such as vacation homes (even if used for rental), mobile homes, boats, timeshares, and so on.)			
Tax Assessed Value of Primary Residence			
Tax Assessed Value of Secondary and all additional Residences			
Value of any Inheritance received			

Expenses and Debts

	For What	Amount($)
Rent/Mortgage		
Other Housing expenses		
	For Whom	Amount($)
Medical and Dental Expenses*		
	For Whom	Amount ($)
Special Family Situations/Unusual Expenses*		

*Please explain fully below by providing information that may be relevant to this request, such as recent extraordinary medical expenses, financial assistance to parents or assistance to other family members. Mortgages, car payments, Bar/Bat Mitzvah fees, private school tuition, etc. are not considered extraordinary/unusual.

Gross Expected Income for Calendar Year 2017			
	Applicant 1 ($)	Applicant 2 ($)	Total ($)
Current Calendar Year Projected Income			

If there are any income differences between this tax year and last tax year, please explain below:

Dues Obligations ($)	
Membership ID: _____	Annual Dues
2017/18 Dues for your Member Category	$2675
Dues paid during 2016/17	
YOUR Proposed Membership Payment for 2017/18*	

**Provide here what you propose to pay for the 2017/18 fiscal year.*