
Last name:

First name:

M.I.:

JTS School/degree:



JTS / GERSHON KEKST
GRADUATE SCHOOL

2019–2020 Kekst Graduate School Application for Loans

(for the academic year September 2019–May 2020)

APPLICATION DEADLINE:
MARCH 4, 2019

THE FOLLOWING MATERIALS MUST BE RECEIVED TO COMPLETE YOUR APPLICATION:

- JTS APPLICATION** (this application)
 - including the **VERIFICATION WORKSHEET**
 - including the **NON-FILING STATEMENT** (if applicable)
 - FAFSA** (to be completed at www.fafsa.ed.gov)
 - YOUR (AND YOUR SPOUSE'S) 2017 FEDERAL TAX RETURN TRANSCRIPT**
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SUBMITTING YOUR APPLICATION

We will accept mailed, faxed, or hand-delivered applications. Send materials to:

Office of Financial Aid

The Jewish Theological Seminary
3080 Broadway, New York, NY 10027-4649
Fax: (917) 493-4112

NOTE: We will not accept emailed application materials unless they are sent directly from a student's JTS email account.

Questions?

Contact us at financialaid@jtsa.edu or (212) 678-8007.

INSTRUCTIONS FOR SUBMITTING U.S. TAX DOCUMENTS

HOW TO SUBMIT YOUR 2017 TAX RETURN TRANSCRIPT

OPTION 1: Upload your 2017 tax information directly into your FAFSA. (This is the recommended option.) Use the IRS Data Retrieval process when completing the FAFSA online (www.fafsa.ed.gov). You will be provided with instructions to link to the IRS while completing the FAFSA. If you choose to use the IRS Data Retrieval Tool, required data elements will be automatically populated for you on the FAFSA.

Because this data comes directly from the tax return you filed with the IRS, you will not need to submit any other tax documentation to the financial aid office—neither tax transcripts nor copies of tax returns (although you may be required to provide proof of untaxed income).

OPTION 2: Request a copy of your 2017 Tax Return Transcript from the IRS.

Use this option only if you are unable to use the IRS Data Retrieval Tool in Option 1, above.

To obtain a copy of your 2017 Tax Return Transcript from the IRS:

1. Go to the IRS website <https://www.irs.gov/individuals/get-transcript>.
2. Click on “Get Transcript ONLINE” or “Get Transcript by MAIL”
3. Follow the instructions to order your 2017 Tax Return Transcript. (Make sure you do *NOT* order a Tax “Account” Transcript, as this form does not have the required information on it.)
4. When you receive your Tax Return Transcript, submit it to the JTS Financial Aid Office.

IF YOU HAVE ANY QUESTIONS ABOUT SUBMITTING YOUR TAX DOCUMENTS TO OUR OFFICE, PLEASE CONTACT THE JTS FINANCIAL AID OFFICE AT FINANCIALAID@JTSA.EDU. IF YOU HAVE ANY QUESTIONS ABOUT USING THE IRS DATA RETRIEVAL TOOL AS YOU COMPLETE THE FAFSA, PLEASE USE THE FAFSA ON THE WEB “LIVE HELP” OR CALL THE FAFSA HOTLINE AT 800-4-FED-AID.

PERSONAL INFORMATION

Last name: _____ First name: _____ M.I. _____

Date of birth (mm-dd-yy): _____ Social security number: _____

Permanent address: _____

City: _____ State: _____ ZIP: _____ Phone: () _____

Mailing address (if different): _____ Valid until (mm-dd-yy): _____

City: _____ State: _____ ZIP: _____ Phone: () _____

Email address: _____ Cell phone: () _____

Are you a U.S. citizen? Yes No If not, are you a Permanent Resident? Yes No

IF A PERMANENT RESIDENT, PLEASE PROVIDE A PHOTOCOPY OF YOUR ALIEN REGISTRATION (GREEN) CARD!

ENROLLMENT INFORMATION *To receive assistance, you must enroll for a minimum of six credits each semester at JTS.*

In the 2019–2020 academic year what program will you be in? MA MA/MSW PhD DHL Major: _____

Year in JTS school beginning September 2019: 1st year 2nd year 3rd year 4th year 5th year and beyond

When do you expect to complete your JTS program? (Graduation date, mm/yy): _____

In the 2019–2020 academic year, where do you plan to live? JTS Residence Hall Off Campus

OUTSIDE SCHOLARSHIPS

If you are receiving any outside scholarships, fellowships, or awards for the 2019–2020 academic year, list sources and amounts:

Source: _____ Amount: \$ _____ Application Pending or Awarded?

Source: _____ Amount: \$ _____ Application Pending or Awarded?

CERTIFICATION

I certify that all of the information on this form is true and complete to the best of my knowledge.

Student's signature: _____ Date: _____

Handwritten signatures are required on all financial aid application forms.

2019–2020 Kekst Graduate School Independent Verification Worksheet

Federal Student Aid Programs

Your application was selected for review in a process called “verification.” In this process, JTS will be comparing information from your application with copies of your (and your spouse’s) 2017 Federal Tax Return Transcripts, or with W-2 forms or other financial documents. Federal regulations require schools to request this information before awarding federal aid. If there are differences between your application information and your financial documents, JTS may need to correct your Student Aid Report (SAR).

Complete this verification form and submit it to the JTS Financial Aid Office as soon as possible.

What you should do

1. Collect your (and your spouse’s) financial documents (Federal Tax Return Transcripts, W-2 forms, etc.).
2. Contact your JTS financial aid administrator if you have questions about completing this worksheet.
3. You (and your spouse if married) should complete and sign the worksheet.
4. Submit the completed worksheet, tax forms, and any other documents JTS has requested to your JTS financial aid administrator.
5. Your JTS financial aid administrator will compare information from your submitted documents.

A. STUDENT INFORMATION

Last name:	First name:	M.I.:	Social security number:
Address (include apt. no.)			Date of birth (mm-dd-yy):
City:	State:	ZIP:	Phone number (include area code): ()

B. FAMILY INFORMATION

List the people in **your household**; include:

- yourself and your spouse if married, and
- your children, if you will provide more than half of their support from July 1, 2019 through June 30, 2020, and
- other people if they currently live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2019 through June 30, 2020.

Also write in the name of the college for any household member who will be attending college at least half-time between July 1, 2019 and June 30, 2020, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

FBI	ame	Age	Relationship	College
	Marsha Cohen (example)	24	Wife	City University

C. STUDENT'S TAX FORMS AND INCOME INFORMATION (ALL APPLICANTS)

1. Check only one box below.
- Check if you have transferred your 2017 tax information into your 2019–2020 FAFSA using the IRS Data Retrieval Tool. Check if you are attaching a copy of your 2017 **Tax Return Transcript**.
 - Check here if you will not file and are not required to file a 2017 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the FAFSA)

Sources of Untaxed Income	2017 Amount	Sources of Untaxed Income	2017 Amount
a. Child Support	\$	e.	\$
b. Social Security (non-taxed)	\$	f.	\$
c. Welfare (including TANF)	\$	g.	\$
d. Food Stamps	\$	h.	\$

3. If you did not file and are not required to file a 2017 Federal income tax return, list below your employer(s) and any income received in 2017 (use the W-2 form or other earnings statements if available).

Sources	2017 Amount
	\$
	\$
	\$

D. SPOUSE'S TAX FORMS AND INCOME INFORMATION (IF STUDENT IS MARRIED)

1. Check only one box below.
- Check if you and your spouse did or will file a joint return.
 - Check if your spouse filed a separate return and you are attaching a copy of your spouse's 2017 **Tax Return Transcript**.
 - Check here if your spouse will not file and is not required to file a 2017 U.S. Income Tax Return.

2. Funds received for child support and other untaxed income. (See worksheets A&B of the FAFSA)

Sources of Untaxed Income	2017 Amount	Sources of Untaxed Income	2017 Amount
a. Child Support	\$	e.	\$
b. Social Security (non-taxed)	\$	f.	\$
c. Welfare (including TANF)	\$	g.	\$
d. Food Stamps	\$	h.	\$

3. If your spouse did not file and is not required to file a 2017 Federal Income Tax return, list below your spouse's employer(s) and any income received in 2017 (use the W-2 form or other earnings statements if available).

Sources	2017 Amount
	\$
	\$
	\$

E. SIGN THIS WORKSHEET

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. If married, spouse's signature is optional.

Student: _____ Date: _____

Spouse: _____ Date: _____

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined and sentenced to jail as indicated by US federal government regulations.

Handwritten signatures are required on all financial aid application forms.

Kekst Graduate School 2017 Non-Filing Statement

Last name: _____ First name: _____ M.I.: _____ Social security number: _____

SECTION 1: STATEMENT OF INCOME

Who must complete this section: students and/or spouses who will **not** file a 2017 federal tax return

I am the: Student Spouse

Please check one box:

I was not employed and had no income earned from work in 2017.

I was employed in 2017. My total income *earned from work* in 2017 was: \$ _____

SECTION 2: SOURCES AND AMOUNTS OF MONEY RECEIVED TO PAY EXPENSES IN 2017

Employer or Source of Money for 2017	Did you receive a W-2?		Amount:
	yes	no	
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

*****W-2 forms are required. Attach all W-2s to this form.*****

*****IRS "Verification of Nonfiling" letter is required. This letter must be obtained from the IRS and submitted with this application.*****

SECTION 3: SIGNATURES

I certify that I have not filed and am not required to file a 2017 federal tax return.
 I also certify that all the information on this form is true and correct to the best of my knowledge.
Only the non-filing individual(s) must sign this form.

Student signature: _____ Date: _____

Spouse signature: _____ Date: _____

Handwritten signatures are required on all financial aid application forms.