

The Horace Smith Fund  
**WALTER S. BARR SCHOLARSHIP**  
**PARENT/GUARDIAN FINANCIAL STATEMENT**

(Completed applications must be received in The Horace Smith Fund office no later than **March 15th.**)  
Send the completed forms to:

**The Horace Smith Fund**  
**16 Union Avenue, Ste. 2K**  
**Westfield, MA 01085**

Name of Student \_\_\_\_\_

The person above has applied for a Walter S. Barr Scholarship. As parents or guardians, you are asked to answer the following questions. *The information furnished on this form will be kept strictly confidential.*

1. Name of Parents or Guardians \_\_\_\_\_

2. Address \_\_\_\_\_

Number & Street

City, STATE, & Zip Code

3. Email Address \_\_\_\_\_

4. Complete the following information for the most recent year:

**Father's** employer and position \_\_\_\_\_

Employer's address \_\_\_\_\_

Father's annual salary or gross income from business/profession      **A \$** \_\_\_\_\_

**Mother's** employer and position \_\_\_\_\_

Employer's address \_\_\_\_\_

Mother's annual salary or gross income from business/profession      **B \$** \_\_\_\_\_

Gross income from other sources      **C \$** \_\_\_\_\_

Gross income provided by other family members      **D \$** \_\_\_\_\_

**TOTAL ANNUAL FAMILY INCOME** (add A+B+C+D)      **Total \$** \_\_\_\_\_

5. List and explain any recent unusual or unexpected expenses or income.

\_\_\_\_\_

6. List other family members who are either financially dependent or who contribute to the family's support.

<u>Name</u>	<u>Age</u>	<u>Place of School or Employment</u>	<u>Dependent or Contributes</u> (check one)	
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

7. List the current values for assets and unpaid balances of liabilities for the following items:

**ASSETS**

- A. CASH (include bank and money market accounts, CD's)      **A** \$ \_\_\_\_\_
- B. Marketable securities (stock, bond, mutual funds)      **B** \$ \_\_\_\_\_
- C. Market value of real estate      **C** \$ \_\_\_\_\_
- D. Other assets (include autos, etc.)      **D** \$ \_\_\_\_\_
- E. Retirement funds (IRA's, 401k, annuities)      **E** \$ \_\_\_\_\_
- TOTAL ASSETS (A+B+C+D+E)      **TOTAL** \$ \_\_\_\_\_

**LIABILITIES**

- F. Real estate mortgage debt      **F** \$ \_\_\_\_\_
- G. Secured loans (autos, RV's, boats, etc.)      **G** \$ \_\_\_\_\_
- H. Unsecured loans (credit card debt, etc.)      **H** \$ \_\_\_\_\_
- I. Other liabilities      **I** \$ \_\_\_\_\_
- TOTAL LIABILITIES (F+G+H+I)      **TOTAL** \$ \_\_\_\_\_

8. Amount of annual rent for your family resident, if any.      \$ \_\_\_\_\_

9. Amount you intend to contribute to applicant's education next year.      \$ \_\_\_\_\_

10. Write any additional information or comments that you would like below or attach another sheet of paper, if more space is required.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature of Parents/Guardians: \_\_\_\_\_ Date \_\_\_\_\_

\_\_\_\_\_ Date \_\_\_\_\_