



Indiana Education Scholarship Account Program

Indiana Education Scholarship Account Program Household Summary Form 2022-2023 School Year

This document is used when:

- The 2021 Federal Tax Return is not provided or unavailable
- The household size on the 2021 Federal Tax Return is incorrect
- The household income, or Adjusted Gross Income (AGI), on the 2021 Federal Tax Return is incorrect or has changed significantly
- Individuals are living in the household, in addition to those listed on the 2021 Federal Tax Return
- There is income coming into the household, in addition to the AGI listed on the 2021 Federal Tax Return

Student: _____ Parent/Guardian: _____

Student Test Number (STN): _____

Which of the household fields are incorrect?

(check both if your 2021 Federal Tax Return is unavailable)

 Household Size Household Income

What has caused the selected field(s) above to be incorrect? A detailed explanation must be provided.

If the household size is incorrect, list all individuals (children included) that are included in the household size. Anyone over the age of 18 must sign next to their name. Anyone listed below must also have their income included in the household income reported on the ESA application. (Please see page 2 and/or 4.)

Printed Name	Signature
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Household Size on 2021 Federal Tax Return (if available) _____ Actual Household Size at the time of Application: _____

If the household income is incorrect or tax return is not provided, list the documentation that has been collected to calculate the income. No application should be submitted without supporting income documentation. (Please see page 2 and/or 3.)

AGI on 2021 Federal Tax Return (if available): \$ _____ Actual Current Income: \$ _____

By signing below, I certify that I have provided the Indiana Education Scholarship Account Program with all supporting documentation and the above information is accurate to the best of my knowledge. I understand that providing inaccurate information may result in the denial and/or forfeiture of the ESA.

Parent/Guardian Signature Date

Household Income Calculation Worksheet

Annual total should be entered for each item. (Calculate monthly payment x 12, etc.)

	Income Type	Household Member Name:	Household Member Name:	Household Member Name:	Household Member Name:
Earnings from Work	<i>AGI on tax forms -OR- Gross Income from W-2 or calculated income from paystubs, statements, etc.</i>	\$	\$	\$	\$
	<i>Income from self-owned farm or business,</i>	\$	\$	\$	\$
	<i>Strike benefits, Worker's comp, Unemployment</i>	\$			\$
Welfare/Child Support/Alimony	<i>Public Assistance Payments/Welfare Benefits (not SNAP)</i>	\$	\$	\$	\$
	<i>Alimony and/or Child support payments</i>	\$	\$	\$	\$
Retirement/ Disability Income	<i>Distributions from pensions, Retirement income, Veteran's benefits</i>	\$	\$	\$	\$
	<i>Social Security</i>	\$	\$	\$	\$
	<i>Supplemental Security Income</i>	\$	\$	\$	\$
	<i>Disability or Life Insurance Benefits</i>	\$	\$	\$	\$
Other	<i>Other Income</i>	\$	\$	\$	\$
Totals for each household member:		\$	\$	\$	\$

Total Household Income:

(Add the totals for each household member)

Documents used for verification (include copies in student file): _____

Comments: _____

Income Assurance Form

<input type="checkbox"/> Earnings from work Wages, salaries, tips, commissions, overtime pay, bonuses, income from self-owned business/farm, strike benefits, unemployment, and/or worker's compensation	\$ _____
<input type="checkbox"/> Welfare Public assistance and welfare benefits	\$ _____
<input type="checkbox"/> Alimony and/or Child Support	\$ _____
<input type="checkbox"/> Child's Income Earnings of a child who is a full-time or regular part-time employee, Social Security, and/or supplemental security income	\$ _____
<input type="checkbox"/> Retirement Pensions, retirement income, veterans' benefits, Social Security, and/or supplemental security income	\$ _____
<input type="checkbox"/> Disability Benefits	\$ _____
<input type="checkbox"/> Investment Accounts	\$ _____
<input type="checkbox"/> Rental Income Rental income, annuities, and/or royalties	\$ _____
<input type="checkbox"/> Interest and Dividend Income	\$ _____
<input type="checkbox"/> Inheritance Inheritance, income from estates, trusts, and/or investments	\$ _____
<input type="checkbox"/> Contributions Regular contributions from persons not living in the household	\$ _____
<input type="checkbox"/> Cash Cash or investment gifts	\$ _____
<input type="checkbox"/> Military Military pay not received as a result of the service member's deployment to/service in an area that has been designated as a combat zone and/or military pay that is received prior to the service member's deployment to/service in an area designated as a combat zone	\$ _____
<input type="checkbox"/> Life Insurance Benefits	\$ _____
<input type="checkbox"/> Living Allowance Money given to a family for house payments and other living expenses	\$ _____
Total \$ _____	

I attest that:

- I have provided the Indiana Education Scholarship Account Program with all financial information included in our household income.
- I have provided documentation to support all amounts listed above as part of our household income.
- If it is discovered that I have not disclosed all information for the household income, my ESA application and eligibility may be revoked.

Signature of Parent/Guardian

Date

Printed Name of Parent/Guardian

Household Size Assurance Form

If the household size doesn't match what is on the 2021 Federal Tax Return or no tax return has been filed, use this form to help in determining the total household size.

Foster Children and Foreign Exchange Students

Foster children and foreign exchange students are considered to be members of the household in which they reside.

Divorce or Separation

Children of divorced or separated parents are generally part of the household that has custody. When joint custody has been awarded and the child physically changes residence, the child is considered part of the household where he/she resides for the majority of the year.

Emancipated Child

An emancipated child living alone is considered to be household size of one.

Child Attending an Institution

A child who attends, but does not reside, in an institution is considered a member of the household in which the child resides.

Child Away at School

A child who is temporarily away at school (college or boarding school) is included as a member of the household.

Child Living with One Parent, Relative, or Friends

If no specific welfare agency or court is legally responsible for the child or where the child is living with one parent, other relatives, or friends of the family, the child is considered to be a member of the household with whom the child resides.

Deployed Service Personnel

Any member of the armed services who is activated or deployed in support of any military combat operation is counted as a household member.

New-Born Child

A new-born child (born after the household taxes have been filed) is included in the household size.

Persons Residing in Household

Related and/non-related persons living in same household.

Household Size Total

I attest that:

- Additional documentation has been provided for all household members who contribute to the household income.

- By signing below, I certify that the above information is accurate to the best of my knowledge and I understand that providing inaccurate information may result in a denial or forfeiture of the ESA.

Signature of Parent/Guardian

Date

Printed Name of Parent/Guardian