

# APPLICATION FOR MEMBERSHIP CONTRIBUTION ADJUSTMENTS

## PRIVATE AND CONFIDENTIAL

2011 - 2012

Each year the annual membership contributions are set by the Board of Governors. The Obligations Committee has the mandate to adjust contributions payable based on individual member requests and circumstances. Each application is assessed on an objective and consistent basis while maintaining sensitivity to individual circumstances. Arrangements with the Obligations Committee must be renegotiated yearly, unless otherwise notified. In order to qualify for a contribution adjustment, members are required to substantiate their claims. We respectfully request your co-operation.

In order to be included in the High Holy Day seating lottery members must submit completed applications and documentation to the Obligations Committee before Fri. June 10, 2011

- 4 Please submit all forms to the Obligations Committee, **in a sealed envelope marked PRIVATE AND CONFIDENTIAL** c/o the Shul office. Do not show your name on the envelope.
- 4 **ALL FINANCIAL INFORMATION IS HELD IN THE STRICTEST CONFIDENCE AND IS AVAILABLE ONLY TO THE OBLIGATIONS CO-CHAIRS.**
- 4 ***DO NOT INCLUDE ANY PAYMENTS***

MEMBERS APPLYING FOR CONTRIBUTION ADJUSTMENTS WILL STILL BE REQUIRED TO COMPLETE MEMBERSHIP RENEWAL FORMS AND HIGH HOLY DAY SEAT SELECTION FORMS. IN ACCORDANCE WITH THE USUAL SCHEDULE, THESE FORMS WILL BE SENT TO ALL SHUL MEMBERS IN MID-JUNE.

**For members who do not wish to take part in the High Holy Day Seating Lottery, completed applications for adjustments and documentation must be received by the Obligations Committee no later than Wednesday, September 7, 2011. Otherwise, the Committee cannot guarantee that your application will be processed in time for you to be eligible to receive High Holy Day tickets.**

### **A Note From Your Obligations Committee**

Dear Member;

The purpose of this Form is to help us to assess your membership contribution for the upcoming year in a fair manner.

To do this, we need **ALL** of the information requested on this Form. In addition, we may request additional information to help us to assess properly.

If we do not receive the requested information, we will not be in a position to consider your application for a reduction.

You must settle any outstanding account balances directly with the Shul office.

**YOUR COOPERATION IS ESSENTIAL**

# MEMBERSHIP CONTRIBUTION ADJUSTMENT FORM INSTRUCTIONS

## DOCUMENTS THAT MUST ACCOMPANY THIS FORM

- u Copy of your 2010 Personal Income Tax Return for all family members (**full returns and not just summary pages**).
- u Copy of your 2010 Notices of Assessment issued by the Tax Department, and copies of your 2009 Notices of Assessment and Reassessment.
- u At a minimum, in order for us to review your application form, we must have a copy of your 2009 Notices of Assessment.
- u Copies of the last 2 pay slips from your employer(s) in the current year 2011 if you are employed.
- u Copies of latest Financial Statements of companies and accompanying tax returns, joint ventures, trusts or estates, self employed or business in which **you or any family members have an interest**. The statements must be those submitted to Revenue Canada.

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#### Realty Taxes

Provide last year's figure as the 2011 tax amount will not have been finalized.

#### Dependent Children

##### Tuition Assessed

At the time of submission, many people will not have settled with the Jewish day schools. **Submit a copy of the obligation form submitted to the school. Indicate that assessment is in progress & show last year's tuition assessed and what was actually paid.**

##### Camps attended

Indicate the name of the camp and the fees paid for 2010.

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Please fill in all information as per your Income Tax Returns, line by line.

Provide a close estimate for the current year 2011. Please note in the section of required documents above that:

- u Employed people must submit copies of their last 2 pay slips.
- u Self employed people and shareholders must submit current financial statements.

Please fill in the section "Other Sources of Income & Support". This may include any amounts provided in cash or goods/services paid for by others.

Family Name: \_\_\_\_\_ First Name: Husband \_\_\_\_\_

Home Phone #: \_\_\_\_\_ Wife: \_\_\_\_\_

Cell Phone #: \_\_\_\_\_

Family Address: \_\_\_\_\_

Husband: Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

Business Address: \_\_\_\_\_ Business Phone #: \_\_\_\_\_

Wife: Occupation: \_\_\_\_\_

Employer: \_\_\_\_\_

Business Address: \_\_\_\_\_ Business Phone #: \_\_\_\_\_

**List all vehicles in your household: (owned or operated in your family)**

Make	Year	Lease	Own	Company Car	Monthly Payments	Insurance Cost

**Dependent Children (Do not include adult children beyond undergraduate level)**

Name	Age	School	Tuition Assessed	Tuition Paid	Grade	Name of Camps Attended	Fees Assessed	Fees Paid

**Dependent Children Studying Abroad (children studying in Israel / elsewhere)**

Name	Age	Country	School	Tuition/Living Expenses Paid in School Year

**Other Dependent Children (not currently enrolled in a school)**

Name	Age	Name	Age	Name	Age

Monthly Child Care Expenses: \_\_\_\_\_

Monthly Elder Care Expenses: \_\_\_\_\_

INCOME	LINE NUMBER ON TAX RETURN	PER INCOME TAX RETURN 2010		ESTIMATED 2011 (mandatory)	
		MALE	FEMALE	MALE	FEMALE
Employment income	101				
Other employment income	104				
Old Age Security pension	113				
Canada or Quebec Pension Plan Benefits	114				
Other pensions or superannuation	115				
Employment Insurance Benefits	119				
Taxable amount of dividends-attach Schedule 4	120				
Interest and other investment income-attach Schedule. 4	121				
Net partnership income-attach T 5013	122				
Rental income-attach Form T776	126				
Taxable capital gains-attach Schedule. 3	127				
Alimony or maintenance	128				
Registered Retirement Savings Plan income	129				
Other income	130				
Business income-Net-attach Schedule	135				
Professional income-Net-attach Schedule	137				
Commission income-Net-attach Schedule	139				
Worker's Compensation payments	144				
Social Assistance payments	145				
<b>Total Income per Tax Return</b>	<b>150</b>				
<b>Other Sources of Income and Support:</b>		<b>Actual 2010</b>		<b>Estimated 2011</b>	
Income and support-Family					
Income and support-Shareholder Loans					
All other sources of income and support – Specify: gifts, tax free allowances, disability payments, non-taxable support, inheritances or from beneficial interest in an estate or trust					

**RRSP'S**

	Current Total RRSP Value
Father	
Mother	

MORTGAGES AND LOANS	NAME OF INSTITUTION	AMOUNT OWING	MARKET VALUE	MONTHLY PAYMENT		
				Mortgage	Taxes	Condo Fees
Home—first mortgage						
Home—second mortgage						
Home—third mortgage						
Cottage						
Rental property						
Other real estate						
Line of Credit						
Line of Credit						
Total credit card balance						
Other Loans						
Rent home Monthly rent \$_____						
Home purchase price:_____ year__						

Please provide any special circumstances that should be considered by the Committee.  
(Attach a letter if necessary)

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**C O N S E N T**

We hereby affirm this information is true, complete and correct.

By affixing your signature to this "Application for Membership Contribution Adjustments" you, the applicant, are granting consent to the collection and use by the Obligations Committee, both for yourself and on behalf of all other members of your family group, of your and their personal information included on this application form. This personal information will only be used for the purpose of assessing the amount of the family contribution.

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Signature \_\_\_\_\_ Date \_\_\_\_\_

**DO NOT WRITE IN THE AREA BELOW — FOR OFFICE USE ONLY**

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Date \_\_\_\_\_ Signature of Chairperson \_\_\_\_\_