AAA Scholarship Foundation 2017-18 Application
Alabama Educational Scholarship Program

New Scholarships are awarded on a first completed, first awarded basis.

If you enroll your student into a private school before you have received a SCHOLARSHIP AWARD LETTER and School Commitment Form (SCF), you will be responsible for your student's tuition and he/she may not qualify for future scholarship funding. Funding is not guaranteed. Please consider this before enrolling your student(s) in a private school.

ARE YOU ELIGIBLE TO SUBMIT AN APPLICATION? COMPLETE THE QUESTIONS BELOW TO FIND OUT.

1.) Does the household live in Alabama?
- ☐ Yes, please continue to question #2.
- ☐ No, we live in another state. *STOP* – do not apply, your household is NOT eligible.

2.) Is your student entering Kindergarten through 12th grade in Alabama?
- ☐ Yes, my student is entering K through 12th grade in Alabama. Please continue to question #3.
- ☐ No, my student will NOT be entering those grades. *STOP* – do not apply, your student does not qualify to receive a 2017-18 AAA scholarship.

3.) Will your student be between the required ages to attend school for your state on or before September 1, 2017?
- ☐ Yes, my Alabama student will be at least 5 years old but not 19 years old or older on September 1, 2017. Please continue to question #4.
- ☐ No, my student will not meet the age requirements for my state. *STOP* – do not apply, your student does not qualify to receive a 2017-18 AAA scholarship.

4.) Will your student meet the Alabama Failing School requirement for your state? (See page 7 for list of "failing" schools.)
- ☐ Yes, my student is zoned to attend a designated Alabama failing school OR my student received a scholarship during a prior school year. Please continue to #5.
- ☐ No, my student is NOT zoned to attend a designated Alabama failing school. *STOP* – Please consider that your student may not qualify to receive a 2017-18 AAA scholarship prior to July 31, 2017. If your student is otherwise qualified they will be on a waitlist for funding until after July 31, 2017 and only awarded IF funding is available. Please skip question #5 and continue to question #6.

5.) If your household is zoned for an Alabama failing school OR if your student received a scholarship during a prior school year, determine whether the household meets the income guidelines in **INCOME CHART A** (on next page). AAA considers ALL household members and their income. To figure out your household size, add all the people you live with together, this is your household size. Now add ALL the annual income for everyone in the household, this is your total annual income. Use these two numbers to look at **INCOME CHART A** for your household size and income. Is your household *at or below* the level for your household size?
- ☐ Yes, we are *at or below* the income listed for our household size. Please continue to question #7.
- ☐ No, our income is above the limit listed for our household size. *STOP* – do not apply, your household does not qualify to receive a 2017-18 AAA scholarship.

6.) If your household is NOT zoned for an Alabama failing school AND has never received a scholarship during a prior school year, determine whether it meets the income guidelines in **INCOME CHART B** (on next page). AAA considers ALL household members and their income. To figure out your household size, add all the people you live with together, this is your household size. Now add ALL the annual income for everyone in the household, this is your total annual income. Use these two numbers to look at **INCOME CHART B** for your household size and income. Is your household *at or below* the level for your household size?
- ☐ Yes, we are *at or below* the income listed for our household size. Please continue to question #7.
- ☐ No, our income is above the limit listed for our household size. *STOP* – do not apply, your household does not qualify to receive a 2017-18 AAA scholarship.

7.) Is your household/ student otherwise eligible?
- ☐ Yes, neither my student nor my household has been disqualified from the program for any reason, including internal audit process. Please continue to complete the application.
- ☐ No, my student or our household has been disqualified/revoked from program participation for any reason, including internal audit process in the past. *STOP* – do not apply, your household does not qualify for a 2017-18 AAA scholarship.

This application is the ONLY chance you have to explain your household situation. Please use additional paper if needed to give us ALL needed information to determine your eligibility. All information must be disclosed NOW. Failure to fully document and complete this application WILL result in your application being denied. You will not be able to provide additional information after processing to change the decision of eligibility made base on the original application and documentation.

PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA K-12 Private School Tax Credit Scholarship Application - Page 2

Use the charts below to answer Questions #5 and 6 on Page 1 of the AAA - Alabama Application

INCOME CHART A	AAA considers ALL family members and their income. To figure out your household size, add all the people you live with together, this is your household size. Now add ALL the annual income for everyone in the household, this is your total annual income. Use these two numbers to look at the income chart below for your household size and income. Is your household *at or below* the level for your household size?

HOUSEHOLDS ZONED FOR FAILING SCHOOLS OR RENEWING HOUSEHOLDS
2017- 2018 Household Income/Financial Resources Table

(New means you did not receive a scholarship from any Organization in 2016-17 for any students in your home. Transfer means this student received funding from another Scholarship Organization in 2016-17. Renewal means you signed AAA scholarship checks for this student in 2016-17. Add-on means you signed AAA scholarship checks for another student in your home in 2016-17, but not for this student.)

Household size	New Household Max Awarded Up to: $6,000 – grades k -5 $7,500 – grades 6 -12	Renewal & Transfer Household Max Awarded Up to: $6,000 – grades k -5 $7,500 – grades 6 -12	Renewal, & Transfer Households Max Awarded up to $4,500 – grades k -5 $5,625 – grades 6 -12	Renewal, & Transfers Households Max Awarded up to $3,000 – grades k -5 $3,750 – grades 6 -12
1	$22,311	$24,120	$27,135	$30,150
2	$30,044	$32,480	$36,540	$40,600
3	$37,777	$40,840	$45,945	$51,050
4	$45,510	$49,200	$55,350	$61,500
Each additional person add:	$7,733	$8,360	$9,405	$10,450

** Business losses must be adjusted to zero and therefore the total income will be adjusted accordingly to determine household eligibility.*

INCOME CHART B	AAA considers ALL family members and their income. To figure out your household size, add all the people you live with together, this is your household size. Now add ALL the annual income for everyone in the household, this is your total annual income. Use these two numbers to look at the income chart below for your household size and income. Is your household *at or below* the level for your household size?

NEW HOUSEHOLDS NOT ZONED FOR FAILING SCHOOLS – AFTER JULY 31ST CONSIDERATION
2017- 2018 Household Income/Financial Resources Table

New Household means you did not receive a scholarship from any organization in 2016-17 for any students in your home.

Household size	New Households Only Max Awarded Up to: $6,000 – grades k -5 $7,500 – grades 6 -12
1	$22,311
2	$30,044
3	$37,777
4	$45,510
Each additional person add	$7,733

** Business losses must be adjusted to zero and therefore the total income will be adjusted accordingly to determine household eligibility.*

A non-refundable application fee must be paid to AAA Scholarship Foundation before this application will be processed. Payment can be made by Credit/Debit Card (see payment form on page 8), Money Order, or Cashier Check.

Payment by check or electronic funds transfer (ACH) is your express authorization that if the payment is returned unpaid for any reason you consent to have your bank account electronically debited twice by AAA or a third party collection agent. One debit will recover the item amount and the second debit will be the charge for applicable returned check and collection fees as allowed by law.

Processing of applications is typically completed within 4-6 weeks once ALL required documentation is received. To check the processing status of your application, go to https://app.wizehive.com/webform/aaasf.

Questions? Call 1-888-707-2465 or email: ALdocs@aaascholarships.org

This application is the ONLY chance you have to explain your household situation. Please use additional paper if needed to give us ALL needed information to determine your eligibility. All information must be disclosed NOW. Failure to fully document and complete this application WILL result in your application being denied. You will not be able to provide additional information after processing to change the decision of eligibility made base on the original application and documentation.

PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA K-12 Private School Tax Credit Scholarship Application - Page 3

IMPORTANT: Fill in the answers asked for in the blank spaces provided throughout this form; write N/A or 0 if items do not apply to you.
DO NOT LEAVE ANY BLANK SPACES.

A) PARENT/GUARDIAN "A" Living with the student

This individual is required to sign scholarship checks.

Last Name, First Name Middle Initial	
Social Security Number	Home Phone Number
Relationship to the Student: ☐ Father ☐ Mother ☐ Step-Father ☐ Step-Mother ☐ Other	
Employed By	
Work Phone Number	Cell Phone Number

B) PARENT/GUARDIAN "B" Living with the student

This individual cannot sign scholarship checks.

Last Name, First Name Middle Initial	
Social Security Number	Home Phone Number
Relationship to the Student: ☐ Father ☐ Mother ☐ Step-Father ☐ Step-Mother ☐ Other	
Employed By	
Work Phone Number	Cell Phone Number

Home (Physical) Address, Apt. # (*must be street address, PO Box not acceptable*)		
Home City	Home State	Home Zip
Home County	E-mail address	
Home Mailing Address (*if different from above*)		
Mailing City	Mailing State	Mailing Zip

C) HOUSEHOLD INFORMATION

1) Number of people who lived in your home during the 2016 year:
Parents/Guardians _____ Children _____ Other _____
Total of above _____(This is your "household size")

2) What is the language spoken in your home: _____

3) What is PARENT A's marital status today:
☐ Single, never Married ☐ Divorced ☐ Living w/boyfriend, girlfriend, fiancé
☐ Married ☐ Separated
☐ Divorced/Remarried ☐ Widowed ☐ Other :

4) Does PARENT A receive child support for any children in the home?
☐**Yes** ☐**No**

5) Does PARENT B receive child support for any children in the home?
☐**Yes** ☐**No**

6) List any parents, not living in the home, for children who live with Parent(s) A and B.

Non-Custodial Parent's Name	Child's Name

7) Does PARENT A and/or B have a divorce/separation agreement? ☐**Yes** ☐**No** (If YES, provide a copy of the divorce/separation agreement if you do not claim the child(ren) on your taxes to show that they live with you.)

8) Date of Separation (Month/Year) or N/A:

9) Date of Divorce (Month/Year) or N/A:

D) HOUSEHOLD MEMBERS CLARIFICATION

List all people who lived with Parents A and B during 2016

You must provide 2016 income documentation for the below individuals (Form 1040 Federal Tax Return, Social Security Income, etc.) List any additional people that live with you on a separate sheet of paper, if needed. If anyone has moved out or there is a change, you must explain on a separate sheet of paper. *Birth Certificates are required for all children 18 and under*.

PLEASE PRINT Name	Relationship to Parent A	Age	Did they file a 2016 Federal Tax Return? (check one)	Total Income in 2016	How long has this person lived with PARENT A?
			☐ Yes ☐ No		
			☐ Yes ☐ No		
			☐ Yes ☐ No		
			☐ Yes ☐ No		

This application is the ONLY chance you have to explain your household situation. Please use additional paper if needed to give us ALL needed information to determine your eligibility. All information must be disclosed NOW. Failure to fully document and complete this application WILL result in your application being denied. You will not be able to provide additional information after processing to change the decision of eligibility made based on the original application and documentation.

KEEP A COPY OF THIS APPLICATION AND ALL DOCUMENTATION FOR YOUR RECORDS.

PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA K-12 Private School Tax Credit Scholarship Application - Page 4

E) SWORN STATEMENTS FOR IRS DID NOT FILE INDIVIDUALS

ATTENTION: This sworn statement will be accepted as documentation that this person did not file 2016 taxes. However, you may be REQUIRED to provide documentation verifying the Did Not File status later this year. ALL adults in the household who Did Not File taxes and are not claimed on a provided Tax Return must EACH complete this section (or a copy of this section if more than one person).

UNDER PENALTY OF PERJURY I DECLARE UNDER OATH THAT I DID NOT FILE FOR THE 2016 YEAR AND I UNDERSTAND THIS FORM ACTS AS MY VERIFICATION OF NON-FILING. I ALSO DECLARE UNDER OATH THAT ALL OF THE STATEMENTS HERE ARE TRUE AND COMPLETE.

I,_____did not file a tax return for the following reason (check one):
(Name)

☐ I received no taxable income.
☐ My taxable income received was less than the amount required for filing with the IRS. Received Amount $_____
☐ Other (explain) _____

I was NOT required to file a 2016 Federal Income Tax Return. In place of a tax return, I have completed this notice and attached all income documentation.

_____ _____
Signature of Person Who Did Not File Relationship to PARENT/GUARDIAN A/B

F) STUDENT INFORMATION (Only complete for students for whom you want a scholarship)

If applying for more than 2 students, make a copy of this page before completing every question.

Student #1 Last Name, First Name, Middle Initial:	Date of Birth (MM/DD/YY) *Birth Certificate Required*:
Student SS#:	Student Gender: ☐ Female ☐ Male
Student Relationship to Parent/Guardian A: ☐ Child/Stepchild ☐ Grandchild ☐ Niece/Nephew ☐ Other (Explain)	
Race: ☐ American Indian or Alaska Native ☐ Asian or Pacific Islander ☐ Black, non-Hispanic ☐ Hispanic ☐ Mixed Race ☐ Pacific Islander ☐ White, non-Hispanic	
Grade Level Student will be entering in August of 2017:	
Name of School attended 2016-2017:	
School County attended in 2016-2017:	
Type of School attended in 2016-2017: ☐ Public ☐ Private ☐ Home School ☐ Charter ☐ Virtual ☐ Not Applicable	
Is the Student Zoned to Attend Failing Public School? ☐Yes ☐No (If yes, include a copy of the student's report card or complete the Form on page 7)	Name of Zoned Public School (if different from above):
Does this student receive any of the following?: ☐ TANF ☐ Food Stamps ☐ FDPIR ☐ Free/Reduced Lunch ☐ ESE ☐ Title 1	
Type of Student: ☐ New ☐ Transfer ☐ Renewal ☐ Add-On	
(New means you did not receive a scholarship in 2016-17 for any student in your home. Transfer means this student received funding from another Scholarship Organization in 2016-17. Renewal means you signed AAA scholarship checks for this student in 2016-17. Add-on means you signed AAA scholarship checks for another student in your home in 2016-17, but not for this student.)	

Student #2 Last Name, First Name, Middle Initial:	Date of Birth (MM/DD/YY) *Birth Certificate Required*:
Student SS#:	Student Gender: ☐ Female ☐ Male
Student Relationship to Parent/Guardian A: ☐ Child/Stepchild ☐ Grandchild ☐ Niece/Nephew ☐ Other (Explain)	
Race: ☐ American Indian or Alaska Native ☐ Asian or Pacific Islander ☐ Black, non-Hispanic ☐ Hispanic ☐ Mixed Race ☐ Pacific Islander ☐ White, non-Hispanic	
Grade Level Student will be entering in August of 2017:	
Name of School attended 2016-2017:	
School County attended in 2016-2017:	
Type of School attended in 2016-2017: ☐ Public ☐ Private ☐ Home School ☐ Charter ☐ Virtual ☐ Not Applicable	
Is the Student Zoned to Attend Failing Public School? ☐Yes ☐No (If yes, include a copy of the student's report card or complete the Form on page 7)	Name of Zoned Public School (if different from above):
Does this student receive any of the following?: ☐ TANF ☐ Food Stamps ☐ FDPIR ☐ Free/Reduced Lunch ☐ ESE ☐ Title 1	
Type of Student: ☐ New ☐ Transfer ☐ Renewal ☐ Add-On	

PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA K-12 Private School Tax Credit Scholarship Application - Page 5

G) TAXABLE INCOME

The 2016 federal tax return for our household was: ☐ Filed (Complete all of Section G) ☐ Not filed yet (See Required Documentation section)
☐ I/We do not file. I/We only receive non-taxable income (Complete Sections E & H)

1) Total number of exemptions claimed on Federal Income Tax form (1040 line 6d)	#
2) From Income Section enter the Total Income (See 2016 1040 line 22 or 1040A line 15)	$
3) Net business income* from self-employment, farm, rentals, and other businesses. See 2016 1040 lines 12, 17, and 18 (Attach Schedules C, E, and/or F from your IRS 1040)	$
* Business losses must be adjusted to zero and therefore the total income will be adjusted accordingly to determine household eligibility.	

H) NON-TAXABLE INCOME

List the total annual amount received by anyone in the household from 1/1/16-12/31/16. DO NOT list monthly amounts

1) Child Support	$	6) Cash Assistance (TANF)	$
2) Social Security income (SSA/SSD, etc.) (Provide documentation for all recipients in household.)	$	7) Food Stamps	$
3) Other non-taxable income (Working for cash, Adoption and/ or Foster Subsidy, Worker's Comp., Disability, Pension/ Retirement, etc.)	$	8) Housing Assistance (Sec. 8, HUD, parsonage, etc.)	$
4) Gifts from family and/or friends	$	9) Loans from family and/or friends	$
5) Personal Savings/Investment Accounts <u>used</u> for household expenses in 2016 (Do not include totals listed in Section J)	$		

*You must provide 2016 documentation for items 2-8; either an official year-end statement or documentation showing totals from 1/1/16-12/31/16.

I) HOUSING INFORMATION

1) Do you rent or own your residence? ☐ Rent (complete question #2, #2a, #2b) ☐ Own (complete question 3)		
2) If renting, what is the monthly rental payment?	$	per month
a. Amount paid by household	$	per month
b. Amount paid by other source(s)	$	per month
3) If you own a residence what is the monthly mortgage payment?	$	per month

J) HOW DID YOU HEAR ABOUT AAA SCHOLARSHIP PROGRAM?

☐ Renewing Household	☐ Flyer, brochure or poster	☐ Internet Search
☐ Another scholarship parent	☐ At an event in my community	☐ Social Media (Facebook, Twitter, etc.)
☐ Referred by friend, family or work associate not on scholarship	☐ Newspaper ad or article	☐ Employer communication
☐ Referred by private school	☐ State Agency	☐ Other:

Processing of applications is typically completed within 4-6 weeks once ALL required documentation is received.
To check the processing status of your application, go to https://app.wizehive.com/webform/aaasf.
Questions? Call 1-888-707-2465

<u>Mail All Pages of the Completed Application and Required Documentation to:</u>

AAA Scholarship Foundation
P.O. Box 15719
Tampa, FL 33684-0719

Phone/Fax: 1-888-707-2465 **Email:** ALdocs@aaascholarships.org

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PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA K-12 Private School Tax Credit Scholarship Application - Page 6

K) CERTIFICATION AND AUTHORIZATION SIGNATURE(S)

✓ I certify that the information provided on the application and all supporting documentation submitted at any time is true, correct and complete to the best of my knowledge. I understand that if I give information that is not true or if I withhold information and my student(s) receive a scholarship for which they are not eligible, I can be lawfully punished for fraud and the scholarship will be denied or revoked.
✓ I certify that no parent/guardian of a student on this application is an owner, operator, principal or person with equivalent decision making authority of an eligible private school or not at the school which my student will attend.
✓ I understand that any information I provide at any time will be verified, which may include computer file matching, public records search, IRS transcripts and that I may be required to provide other information and/or documentation.
✓ I authorize the release of personal, financial and educational information for the purpose of determining eligibility and for research.
✓ I understand that AAA Scholarship Foundation does not discriminate because of race, color, sex, age, disability, religion, nationality or political belief.
✓ I authorize AAA Scholarship Foundation and its application processing company to make this form and the information therein available to the appropriate state agencies as required by the law governing the scholarships. I authorize the application and all attachments to be returned to AAA Scholarship Foundation from the application processing company.
✓ I agree to follow the rules and responsibilities as they apply to the program as set forth in the Parent and School Handbook, available online at www.aaascholarships.org.
✓ I understand if I am deemed eligible and am awarded a scholarship, that I am not automatically entitled to a scholarship in following years.
✓ I understand that it is my responsibility to reapply and document my eligibility whenever I am required to if I accept a scholarship.
✓ I understand if I enroll my student(s) into a private school before receipt of a Scholarship Award Letter and School Commitment Form (SCF), I will be responsible for their tuition and the student(s) may not qualify for future scholarship funding. I understand funding is not guaranteed.

L) SIGNATURES

Parent/Guardian A _____ Date _____

Parent/Guardian B _____ Date _____

M) REQUIRED DOCUMENTATION

Application MUST include the following with the completed application (and any other documentation requested):

- ☐ Birth Certificates are required for all children 18 years and younger
- ☐ 2016 Signed Federal Tax Return and all Schedules/Forms
- ☐ 2016 Year-End Non-taxable Income Documentation
- ☐ Alabama Failing School Zone Form (page 7) or Report Card, if required
- ☐ Payment Form (page 8), Money Order or Cashier Check made payable to AAA Scholarship Foundation
- ☐ Letter/documentation of Unusual Circumstances, if needed

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Questions? Call 1-888-707-2465

Mail All Pages of the Completed Application and Required Documentation to:

AAA Scholarship Foundation
P.O. Box 15719
Tampa, FL 33684-0719

Phone/Fax: 1-888-707-2465 **Email:** ALdocs@aaascholarships.org

PARENT/GUARDIAN A Name:_____ **SS#** _____

Alabama Failing School Zone Form – Page 7

If your household is zoned for a failing public school and an official failing school notification letter or student's report card for that zoned failing school is not available, this form must be completed for each affected student entering kindergarten through 12th grade during 2017-2018.

This form is to be completed by the public school or district for which the student is zoned to attend in the 2017-2018 school year.

Link to the Alabama Department of Education Failing Schools List:
http://www.alsde.edu/dept/data/AAA%20Tabbed/AAA%20Failing%20School%20List%202017.pdf

Student name:
Name of Zoned Public School and District:
Is the Public School considered a Failing School for 2017-2018? ☐ Yes ☐ No (check one)

Student name:
Name of Zoned Public School and District:
Is the Public School considered a Failing School for 2017-2018? ☐ Yes ☐ No (check one)

Printed Name and Title of Public School Representative completing this form:
Signature and Date:

Processing of applications is typically completed within 4-6 weeks once ALL required documentation is received.
To check the processing status of your application, go to https://app.wizehive.com/webform/aaasf.
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Tampa, FL 33684-0719

Phone/Fax: 1-888-707-2465 **Email:** ALdocs@aaascholarships.org

PARENT/GUARDIAN A Name:_____ **SS#** _____

2017-2018 AAA-ALABAMA Payment Form - Page 8

Did you submit a paper/pdf application? ☐ Yes ☐ No If yes, the non-refundable application fee is $35.00

Did you submit an online application? ☐ Yes ☐ No If yes, the non-refundable application fee is $30.00

Are you paying with a Money Order or Cashier Check payable to AAA Scholarship Foundation? ☐ Yes ☐ No
If yes, please skip the rest of this form.

Are you paying online at http://www.aaascholarships.org/payment/ ☐ Yes ☐ No If yes, please complete the rest of this form.

Are you the applicant? ☐ Yes ☐ No If yes, please sign where indicated below.

If you are not the applicant but are paying the non-refundable fee on their behalf, please list your name and address as it appears on the payment account.

Payee Name (if not the applicant only):_____

Payee Address: _____

Payee Phone Number: _____

Payee Email Address: _____

I understand that AAA Scholarship Foundation will charge my credit/debit card or debit my bank account for the appropriate NON-REFUNDABLE application processing fee via PayPal.

Concerning ACH Payments: We suggest confirming with your financial institution that third-party debits are allowed from the account you wish to use. If you have not confirmed this, as well as the information required to process the payment(s), we cannot confirm the payment(s) made will process successfully. Please be aware that passbook savings, equity lines of credit, and most money market accounts do not allow third-party debit. It is your responsibility to make sure there are adequate funds in your account today. All payments will be cleared and processed by your bank to determine availability of funds. Typically this process can take up to 3-5 business days and is dependent upon your financial institution. Payment by Electronic Funds Transfer (ACH) is your express authorization that if the payment is returned unpaid for any reason you consent to have your bank account electronically debited twice by AAA or its third party payment processor or collections agency. One debit will recover the item amount and the second debit will be the charge for applicable returned check and collection fees as allowed by law.

_____ _____
Signature of Payee Date Signed

A non-refundable application fee must be paid to AAA Scholarship Foundation before this application will be processed.
Payment can be made online via Credit/Debit Card, or by Money Order, or Cashier Check.
Payment by check or electronic funds transfer (ACH) is your express authorization that if the payment is returned unpaid for any reason you consent to have your bank account electronically debited twice by AAA or a third party collection agent. One debit will recover the item amount and the second debit will be the charge for applicable returned check and collection fees as allowed by law.

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