



## Tuition Assistance Program for 2011-12 Academic Year

Cape Ann Waldorf School has contracted with the FACTS Grant & Aid Assessment Program to process financial aid applications and help evaluate a family's request for financial aid.

Please note these important dates:

### January 10, 2011:

- Deadline for completing an on-line application to FACTS. You may begin your on-line application anytime after December 1, 2010. The application fee is \$25 per family.
- Deadline for FACTS to receive your **2009** tax documents (with all schedules) and W-2's to FACTS. You must send them in the mail prior to January 10 so that FACTS receives them by January 10. You may fax them on January 10.  
\*See checklist of documents to send. If applicable, deadline for submitting supporting documentation for **2009** Social Security income, Welfare Child Support, Food Stamps, Worker's Compensation, and TANF.
- Deadline for submitting Tuition Assistance Verification Form to the business manager who will forward it to TA Committee. **This form is now required for all applicants.**

### February 1, 2011:

- Tuition assistance decisions will be made and mailed to families.

### February 15, 2011:

- Reenrollment deadline.

### April 20, 2011:

- Deadline for submitting **2010** tax documents (with all schedules) and W-2's to FACTS. \*See checklist of documents to send. If applicable, deadline for submitting supporting documentation for **2010** Social Security income, Welfare Child Support, Food Stamps, Worker's Compensation, and TANF.

If you would like to complete an application online, you may go to

<https://www.factstuitionaid.com/facts/gaindex> and click on:

Applicant Sign-In

If you would like more information about the company, feel free to visit FACTS' Web site at [www.factsmgt.com](http://www.factsmgt.com). FACTS works with nearly 5,000 educational institutions and over a million families each year, helping them achieve their goals. They have been in business since 1986 and specialize in working with schools like ours.

[www.factsmgt.com](http://www.factsmgt.com) If you have questions, please contact FACTS at 1-866-315-9262.

**Checklist of documents to gather before you begin the FACTS application.**

- Most recent Federal tax return
- Information about:
  - Child support received
  - Social Security information received that was NOT taxed, such as SSI benefits
  - TANF
  - Welfare/Aid for Families with Dependent Children (AFDC/ADC)
  - Food Stamps
  - Tuition Support anticipated from friends/relatives/employer
  - Worker's Compensation
  - Other nontaxable income (i.e. Clergy/Pastoral/Military Housing Allowance, Foster Care Allowance, VA Benefits, etc)
- Rent/Mortgage Monthly Expense (include principal, interest, taxes and home insurance)
- Second home monthly expenses (include mortgage payment, interest taxes and home insurance)
- Home equity monthly loan payments
- Vehicle information – make/model, year and monthly payment
- Total Credit Card debt and total of all minimum payments
- Student loan monthly payments
- Other Loan payments (not including cell phone, utilities, or other living expenses)
- Child Support monthly payments
- Health insurance monthly premiums and out-of-pocket medical expenses
- Annual vehicle insurance expenses
- Charitable contributions (cash/check)
- College expenses
- Child/day care expenses
- Elder Care expenses
- Value of cash, savings, checking accounts, stocks, bond investments, mutual funds, certificates of deposits, retirement plan assets (401(k), 403(b), and/or IRAs).
- Annual contribution to retirement plan assets
- Estimated value of home and second home
- Amount owed on home and second home

Note: When you are submitting an online application, at any time you can select "Finish Later" and log off. When you sign back in, you will be taken to the next section of the application that needs to be completed.

Large envelopes for mailing tax documents to FACTS are available in the business office.

Mail or fax supporting documents to:

FACTS Grant & Aid Assessment

PO Box 82524

Lincoln, NE 68501-2524

Fax Number: 1-866-315-9264

Please write "**for Cape Ann Waldorf School**" on the envelope or on the fax cover sheet.

**Checklist of Documents that must be sent directly to FACTS:**

**By January 10:**

- Copy of 2009 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. If applicant and co-applicant file separately, we require both tax returns for the same tax year. We do NOT accept state tax returns.
- Copies of all 2009 W-2 Wage and Tax Statements for both you and your spouse.
- Copies of supporting tax schedules if you have income from:
  - Business – Attach Schedule C or C-EZ (Form 1040) and Form 4562 Depreciation and Amortization
  - Farm – Attach Schedule F (Form 1040) and Form 4562 Depreciation and Amortization
  - Rental Property – Attach Schedule E (Form 1040)
  - S-Corporation – Attach Schedule E (Form 1040), Form 1120S (4 pages), Schedule K-1 and Form 8825
  - Partnership – Attach Schedule E (Form 1040), Form 1065 (4 pages), Schedule K-1 and Form 8825
  - Estates and Trusts – Attach Schedule E (Form 1040), Form 1041 and Schedule K-1
- Copies of all supporting documentation for 2009 household Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF).

**By April 20:**

- Copy of 2010 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. If applicant and co-applicant file separately, we require both tax returns for the same tax year. We do NOT accept state tax returns.
- Copies of all 2010 W-2 Wage and Tax Statements for both you and your spouse.
- Copies of supporting tax schedules if you have income from:
  - Business – Attach Schedule C or C-EZ (Form 1040) and Form 4562 Depreciation and Amortization
  - Farm – Attach Schedule F (Form 1040) and Form 4562 Depreciation and Amortization
  - Rental Property – Attach Schedule E (Form 1040)
  - S-Corporation – Attach Schedule E (Form 1040), Form 1120S (4 pages), Schedule K-1 and Form 8825
  - Partnership – Attach Schedule E (Form 1040), Form 1065 (4 pages), Schedule K-1 and Form 8825
  - Estates and Trusts – Attach Schedule E (Form 1040), Form 1041 and Schedule K-1
- Copies of all supporting documentation for 2010 household Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and TANF.

**Tuition Assistance Verification Form**

**This form must be submitted by January 10 in order for the Tuition Assistance Committee to consider your request for tuition assistance.**

Please fill out this form and send it to the business manager who will forward it to the Tuition Assistance Committee.

Name of parents:

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Please describe any significant changes between your 2009 income and 2010 income that would help the TA Committee to fully understand your current financial situation:

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Please describe any circumstances or challenges that are not contained in your TA application or your 2009 tax returns that you would like the TA Committee to know about when considering your application for tuition assistance (feel free to attach a narrative letter to this form):

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We hereby acknowledge that any tuition assistance award that we receive will be a **contingent award** and will be subject to review and adjustment after the Tuition Assistance Committee has reviewed our 2010 tax returns.

Signed:

Date:

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