



### Tuition Assistance Guidelines

Linden Waldorf School will be using FACTS Grant & Aid Assessment to review all tuition assistance applications for the 2019-20 school year. This letter outlines the steps you need to take to apply for assistance. **The first round deadline for applying is February 28, 2019.**

The following information is required to process your application:

#### Provide to Linden Waldorf School:

- For parents sharing custody of their child(ren), submit a copy of your parenting plan or custodial agreement if there is language pertaining to educational decision making and/or financing private school education.

#### Provide to FACTS:

- Complete an online application through FACTS Grant & Aid Assessment at <https://online.factsmgmt.com>. If you have already created an account for FACTS Tuition Management, you may use the same username and password. You will not need to create a separate account for the Grant & Aid assessment.
- Pay the \$30 non-refundable application fee.
- If the parents are divorced, the parent responsible for payment of the child or children's tuition should complete the application. If each of the divorced parents is responsible for a portion of the child or children's tuition, each parent should complete a separate application and indicate the portion of tuition for which he/she is responsible.
- Within the online assessment, you will have a place to describe in detail the present financial situation of your family and the circumstances that make tuition assistance necessary. Please include any changes likely to affect your financial situation going into the next school year and/or explain if your income will differ from what is reflected on the tax return.
- Submit the following relevant documentation. If applicant and co-applicant file separately, we require both tax returns for the same tax year. Instructions for how to submit these documents by fax or mail are given as part of the online application process.
  - A copy of your **2017** IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return (2 pages)
  - Any required supporting tax Schedules C or C-EZ, Schedule E, Schedule F, Depreciation Form 4562, S Corporation Form 1120S (4 pages) & Schedule K-1 and Form 8825, Partnership Form 1065 (4 pages) & Schedule K-1 and Form 8825, Estates and Trusts Form 1041 & Schedule K-1.
  - Copies of all **2018** W-2 Wage and Tax Statements for both you and your spouse. NOTE: If you are applying before you have received all **2018** W-2 Wage and Tax Statements, please submit them as soon as they become available.
  - Copies of all supporting documentation for household Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF).
- *Make sure to check your e-mail address regularly for notices sent by FACTS indicating missing information or tax documents.*

**Note: The Tuition Assistance Committee cannot begin to review your assistance request if any of the above items are missing or incomplete. The Committee may also request additional information to help assess the need for assistance. The Committee will hold your information in the strictest confidence.**

If you are applying for tuition assistance, you will pay only the \$315/per child enrollment fee when you submit your enrollment contract. The tuition protection fee will be billed on July 5<sup>th</sup> after most tuition assistance offers have been finalized.

If you have questions or concerns about the application process, please call a FACTS Customer Care Representative at 1-866-441-4637 or contact William Bentley, Business Manager, at 615-354-0270 x30.

*Students will not be permitted to attend class until the first tuition payment, all required fees and any previous outstanding balances are paid. Filing with FACTS by June 1 allows enough time for this process to be completed, provided there are funds remaining in the Tuition Assistance Budget. Once the Tuition Assistance Reply Form is returned to the Business Manager, adjustments will be made to tuition, but before that time, the full tuition will be charged.*