



## Need-based Financial Aid FAQ

### *Important Dates & Deadlines for Returning Families*

11/01/2019	Need-based financial aid renewal notices are sent to returning families.
12/15/2019	Deadline to submit updated Parent Financial Statement (PFS) to SSS.
01/15/2020	Re-enrollment Contracts for 2020-2021 are sent to returning families.
01/31/2020	Re-enrollment Contracts and deposits due in TADS.

### *Important Dates & Deadlines for Prospective Families*

	<u>Early Decision</u>		<u>Regular Decision</u>
11/22/2019	PFS & Admissions Application Due	01/24/2020	PFS & Admissions Application Due
12/13/2019	Notifications sent to families.	03/06/2020	Notifications sent to families
01/03/2020	Enrollment contracts & deposits due if accepting an offer.	04/10/2020	Enrollment contracts & deposits due if accepting an offer.
4/20/2020	Students on the FA Waitlist will receive an update if additional funds become available.		

### *Need-Based Financial Aid Application Process*

1. Prepare the following documents:
  - a. IRS Form 1040 for current (2019) & previous two years (2017, 2018)
  - b. W-2 or IRS Form 1099
  - c. Schedule C or C-EZ (for self-employed parents only)
2. Save this link in your web browser <https://sss.secure.force.com/familyportal>
3. New families will need to create a Family Portal account using your email address and password. Returning families should use the same email address and password as the previous year.
4. Complete the Parent Financial Statement (PFS)
5. Submit the nonrefundable \$51 application fee to SSS.

Download the “Applying for Financial Aid” for detailed step-by-step instructions. For help completing the PFS, please contact the SSS Parent Support Team at [sss@communitybrands.com](mailto:sss@communitybrands.com) or (800) 344-8328.

### *Key Terms*

Parent Financial Statement (PFS):	The online application form where families detail and disclose financial resources including, but not limited to, income, assets, debt, etc.
School & Student Services (SSS):	The third-party service that securely collects, verifies, and analyzes financial and tax documents to calculate how much a family can contribute toward the cost of tuition.
Tuition Aid Data Services (TADS):	The enrollment and billing platform that enrolled families use to make tuition payments, track remaining balances, deadlines, and re-enroll.

## *Frequently Asked Questions*

### ❖ **Who can apply for need-based financial aid?**

We encourage all families who might need tuition support to submit a PFS. However, qualifying for financial aid does NOT guarantee a grant.

### ❖ **How long does it take to complete the PFS?**

We recommend setting aside 2-3 hours to complete the application. You may start, save, and return to the application at any time.

### ❖ **What does need-based financial aid cover and not cover?**

Typically, the grant covers a percentage of tuition costs. The grant does not cover mandatory program fees, mandatory lunch fees, transportation, health insurance, and other incidental costs.

### ❖ **How much is a typical grant?**

Need-based financial aid grants vary in amounts and take into consideration additional factors including, but not limited to, cost of living, home equity, other income, number of children in tuition-charging institutions, payments to pension and retirement plans, discretionary spending, and student assets.

### ❖ **How do I maintain the grant, if awarded?**

Need-based financial aid grants are awarded annually provided the student remains in good academic and disciplinary standing; families must also submit an updated PFS and tax documents every year. FA Committee reserves the right to make adjustments pending significant changes to a family's situation and the school's resources. Families can expect grants to be renewed at the original level of funding, provided that the PFS demonstrates continued need.

### ❖ **What is the policy regarding parents who live in separate households?**

We expect both parents to financially support their child's education, which requires both households to complete the PFS and submit tax returns. If either parent has remarried, the spouse's contributions will also be taken into consideration. A non-custodial parent's information may be waived on a case-by-case basis. Custodial parents must complete the [Non-Custodial Parent Information Form](#) as part of the need-based financial aid application. A financial aid award will not be made without information from and about all parents.

### ❖ **Are international students eligible for financial assistance?**

Unfortunately, students who are not U.S. Citizens or Permanent Residents are not eligible for need-based awards. However, exceptional students may be considered for merit-based scholarships.

### ❖ **How are stay-at-home parents considered when applying for need-based financial aid?**

In the interest of equity, if one parent elects to stay at home and not seek employment, the FA Committee will impute a basic income for the non-working parent. Exceptions are made for parents that are caring for a non-school age child or an elderly parent.

### ❖ **Who should I contact for additional questions?**

If you have specific questions about your unique situation that is not addressed in the Financial Assistance Program's Policy Manual, please contact our financial assistance staff at [financialassistance@whittleschool.org](mailto:financialassistance@whittleschool.org) or call 202-559-2049.

We partner with School and Student Services (SSS) in our financial aid process. To begin your financial aid application, you will complete the SSS Parents' Financial Statement (PFS) then submit the required documents for our school indicated below.

The PFS is a comprehensive application that will take some time to complete. Give yourself the time you need by not waiting until our deadline approaches. You'll need your most recent tax return before beginning the PFS. We also recommend reviewing SSS resources to help families with the financial aid process. They are found at <http://www.solutionsbysss.com/parents>.

**We will communicate our financial aid decision to you.** To make our decision, we use the information from the PFS as a starting point and consider our school policies, practices, and available budget.

### How to complete your Parents' Financial Statement (PFS) online

- Beginning October 2, 2019, go to the SSS Family Portal at <https://sss.secure.force.com/familyportal>.
- Create your Family Portal account with your email address and a password. If you applied for financial aid last year, log into the Family Portal as a Returning Family using your same email address and password.
- Complete a PFS for Academic Year 2020-21. You can log out at any time and return later to finish it.
- When all PFS sections are complete with green checks, the Submit & Pay button activates. Follow prompts to the payment screen. The \$51 fee is nonrefundable. Once your PFS is submitted, it cannot be withdrawn from the SSS system.
- After you pay for and submit your PFS, access to "My Documents" activates to upload required documents by their deadlines as part of your application process.

### How to submit your required documents online

- Prepare your document files for uploading. Make sure the documents are on your computer and each specific form is saved as a separate file. Examples: a) 1 PDF file for the 1040 with all schedules and worksheets included, b) each W2 saved as its own file. Remove any security or password protection from your files.
- Return to your Family Portal account and confirm you are on the Academic Year 2020-21 Dashboard.
- Open "My Documents" from the Dashboard.
- In the "Required Documents" section, use the Upload button or link associated with the specific document type. Follow prompts to locate, select, and confirm the file to upload.
- Click the Submit button to complete your upload. The date will appear in the "Date Uploaded" column within minutes of the upload. Repeat this process until all required documents are submitted by their deadlines.
- **Mailing in Documents:** If you prefer to submit required documents by mail, you must print your Cover Sheet from "My Documents" and send it with your documents to the address it provides at least 10 days before the deadlines.

### Key information you need to know about our school as you complete the 2020-21 PFS

Our school's full name: **Whittle School & Studios**

Our SSS code: **200008**

Contact information for our financial aid office: **financialassistance@whittleschool.org**

Deadline for completing the PFS: **November 22, 2019 (Early Decision) or January 24, 2020 (Regular Decision)**

Documents we require you to submit with your PFS:

**1040 with all schedules and worksheets\***

**W2 Form**

**1099 Form**

Tax Year:  2019  2018  2017

Tax Year:  2019  2018  2017

Tax Year:  2019  2018  2017

**\*Self-Employed Parents:** Include all related business forms with your 1040 file (i.e., Schedule C, Schedule E, 1120, 1065, and K-1).

**Need help with submitting your PFS or required documents?**

Contact SSS Parent Support at (800) 344-8328 or [sss@communitybrands.com](mailto:sss@communitybrands.com).