

## **Tuition Assistance Overview** **Returning TMA Families: 2019 – 2020**

Dear Parents,

We believe the primary responsibility for financing a student's independent school education rests with the family. However, we also recognize the need to provide assistance to retain a broad spectrum of students in concert with The Montessori Academy's mission. Tuition Assistance is awarded by the academic year. Parents must apply for Tuition Assistance each year to be considered. Please be advised that you may not receive the same Award amount each year. Your financial information is confidential and guarded closely.

- The Toddler program does not qualify for Tuition Assistance.
- Auxiliary fees are not part of a Tuition Assistance Award.

### **Please note the following important information:**

- The Montessori Academy Edison Lakes (TMA) uses FACTS Grant & Aid to process applications.
- The FACTS Grant & Aid application is completed on-line and has an annual fee of \$35.00 per family payable to FACTS Grant & Aid on their website at the end of the session.
  - Families applying for Tuition Assistance must turn in the enrollment contract, Family Information form, Tuition Assistance contract amendment and a \$250/child tuition deposit to TMA before applying on-line with FACTS Grant & Aid.
  - The following documents must be submitted to FACTS Grant & Aid when applying for Tuition Assistance: A copy of your 2018 income tax returns, W2's, 1099's and all schedules. Also, please provide supporting documentation for Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and TANF. These are required for verification of the information submitted to FACTS Grant & Aid. Please upload pdf forms or fax to 866-315-9264 (include applicant ID).
  - You may apply for more than one student on the same FACTS Grant & Aid application. *Siblings not currently enrolled in TMA must have an application to the school on file with the Admissions office.*
- Divorced or separated parents must each file a separate on-line Tuition Assistance application.
  - Applicants should provide all necessary information as to each parent's legal obligation to pay tuition.
  - Tuition Assistance Awards are proportioned per each parent's demonstrated need and each parent's financial obligation for tuition.
- Regardless of primary custody, FACTS on-line applications are required for **all adults contributing financially** & living in the household of the child.
- Tuition Assistance is Awarded as a percentage of the tuition.
- Awards are made annually based on financial need, enrollment needs of TMA, parent volunteer commitment and maintenance of a population consistent with our mission.

### **Time Line:**

- **February 28, 2019** Enrollment contracts, Family Information forms, Tuition Assistance contract amendments & deposits due to school
- **March 15, 2019** Tuition Assistance on-line application must be completed with FACTS Grant & Aid
- **March 29, 2019** All 2018 income tax return information must be sent to FACTS Grant & Aid
- **April-May, 2019** Returning families who have a signed contract, Family Information form, Tuition Assistance contract amendment and deposit on file, will be notified of their Tuition Assistance Award.
- **10 days after Award** Acceptance of Award Offer due to TMA. Any Award not accepted within 10 business days of the Offer will be returned to the financial aid pool and the Offer will be null & void.

\* Tuition Assistance Awards will only be made to families who have a signed enrollment contract, Family Information form, Tuition Assistance contract amendment, and a \$250 tuition deposit on file with TMA.

## **FACTS Grant & Aid**

### **On-line application process**

#### **Overview:**

The Montessori Academy uses FACTS Grant & Aid to process applications. FACTS Grant & Aid will be the standard submission format for all applications.

FACTS Grant & Aid does not decide whether Tuition Assistance will be given or how much to give; rather FACTS Grant & Aid provides a need-based Tuition Assistance analysis service which includes a recommendation of what a family should reasonably contribute toward tuition. All information from FACTS Grant & Aid is kept confidential.

Results are reviewed by the Financial Aid Committee which makes recommendations based on next year's budget. Upon approval by the Committee, Tuition Assistance Offers are then sent to families.

#### **Instructions:**

To start the process, please log onto the FACTS Grant & Aid site at:

<https://online.factsmgt.com/signin/4DT7V>

- As a reminder, you must reapply each year.
- The application process is self-guided. You may navigate in and out of the program allowing you to partially complete an application and go back to it at another time. Online e-mail and a 24/7 helpline is provided. Please do not call the school with questions.
- After completing the online application, you will be required to upload or fax your 2018 tax returns for both state and federal taxes with all schedules, 1099's and W-2's to FACTS Grant & Aid. Also, please provide supporting documentation for Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and TANF. These are required for verification of the information submitted to FACTS Grant & Aid. Please upload pdf forms, with a size less than 20 MB, or fax to 866-315-9264 (include applicant ID). Please do NOT use your mobile device to photo copy required documentation due to problems with legibility.
- The online submission deadline for all applications is March 15, 2019.
- Your tax return must follow the submission, and be uploaded or faxed by March 29, 2019.
- Applications with incomplete information cannot be processed by FACTS, and will not be considered by the Tuition Assistance Committee until complete information is submitted.
- Submitting false or deliberately misleading information is grounds for immediate revocation of any Tuition Assistance Offers, Awards, and Agreements; and will result in a **permanent** ban on applying for any future Tuition Assistance.
- Contact Susan Finster, Assistant Head of School for Finance & Operations at The Montessori Academy Edison Lakes with questions: 574-256-5313 ext 211 or [SFinster@tma-el.org](mailto:SFinster@tma-el.org)

### Tuition Assistance Contract Amendment

I/We are applying for Tuition Assistance for the 2019 - 2020 school year.

**Family Information**

Children for whom aid is being requested:

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Program \_\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Program \_\_\_\_\_

Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Program \_\_\_\_\_

	Mother	Father
Name		
Home Address		
Home Phone Cell Phone Email address		
Occupation		
Place of Employment		
Business Address		
Business Phone		
Name and Address to which correspondence should be sent		

Marital Status	<input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Never Married <input type="checkbox"/> Widowed <input type="checkbox"/> Other _____
Children(s) Principal Residence	<input type="checkbox"/> Both Parents <input type="checkbox"/> Father <input type="checkbox"/> Mother <input type="checkbox"/> Stepfather <input type="checkbox"/> Stepmother <input type="checkbox"/> Grandparents <input type="checkbox"/> Other _____

- If parents are divorced or separated, please state financial obligation of the non-custodial parent. If the non-custodial parent claims no financial responsibility, or limited financial responsibility for education expense, submit appropriate documentation, such as a court decree. Tuition Assistance Awards are proportioned per each parent's demonstrated need and each parent's financial obligation for tuition. Regardless of primary custody, FACTS on-line applications are required for **all adults contributing financially** & living in the household of the child. Incomplete submissions cannot be processed.

## Tuition Assistance Contract Amendment (continued)

I agree to the following:

I will return this form (Tuition Assistance Contract Amendment), the enrollment contract, Family Information form and a \$250/child tuition deposit by February 28, 2019.

I will go on-line to complete the FACTS Grant & Aid application by March 15, 2019.

I will submit my 2018 tax information to FACTS Grant & Aid by March 29, 2019. I will include the complete tax return (state return, federal return, W-2's, 1099's, all schedules, etc.).

Tuition Assistance is awarded as a percentage of the child's tuition. One or Both parents, including separated or divorced parents, must sign this amendment and the enrollment contract for Tuition Assistance to be awarded.

\_\_\_\_\_  
Signature of Parent, legal guardian or custodian

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Parent, legal guardian or custodian

\_\_\_\_\_  
Date