



AFFORDING MONTGOMERY SCHOOL TUITION ASSISTANCE POLICY and INSTRUCTIONS for the 2019-2020 school year

The School's Commitment:

Aiming to promote and maintain socioeconomic diversity among our student population, Montgomery demonstrates a strong commitment to need-based tuition assistance by providing a share of the School's budget to fund the financial needs of its students in Prekindergarten through Grade Eight.

While we are fortunate to be able to provide tuition assistance for independent schooling, we believe that families bear the primary responsibility for financing education to the extent that they are able. To that end, our expectation is that Montgomery School tuition is considered a fiscal priority in your household both now and throughout your child's years at Montgomery. Our tuition assistance program exists to help assure that any admitted student with demonstrated need will have the opportunity to attend Montgomery School.

How is tuition assistance given?

In order for us to allocate our resources wisely and fairly, we have enlisted the help of School and Student Services by the National Association of Independent Schools (SSS by NAIS). SSS does not decide whether tuition assistance will be given or how much to give; rather SSS provides a need-based tuition assistance analysis service. SSS provides the School with a report, which includes a recommendation of what a family should reasonably contribute toward tuition. All information from SSS is kept confidential. Montgomery School's confidential Tuition Assistance Committee reviews each application and the committee recommends to the Head of School allocation of tuition assistance resources for the next year. Upon approval by the Head of School, tuition assistance offers are sent to families.

Who may apply for tuition assistance?

Anyone. Montgomery School accepts tuition assistance applications from families of any race, religion, national and ethnic origin. Throughout the administration of educational admission policies, tuition assistance programs and athletic or other school-administered programs, the School does not discriminate on the basis of race, religion, national or ethnic origin.

Does applying for tuition assistance influence the admission decision?

No. Montgomery School accepts students based on academic merit, test scores and personal qualities. Tuition assistance files are reviewed and awards are made only after a student is admitted. If a student is either admitted or placed on a wait list, the tuition assistance file is shredded and destroyed.

How is tuition assistance determined?

SSS sends a report to Montgomery School, which provides the School with a general assessment of a family's ability to pay for education. Major factors in determining financial need include, but are not limited to, income, assets (including home equity, college funds, and other investments), family size, and the number of children attending tuition-charging institutions.

What is the deadline for applying for tuition assistance?

Montgomery School will be observing the following Tuition assistance Deadlines:

1. Montgomery School's Application for Tuition assistance: **Due on or before January 15, 2019**
2. SSS Personal Financial Statement (PFS): **Due on or before January 15, 2019**
3. 2017 1040, 1040A or 1040EZ and all schedules*: **Due on or before January 15, 2019**
4. 2018 End of Year Paystubs: **Due on or before January 15, 2019**
5. 2018 W2 Form: **Due on or before February 5, 2019**
6. 2018 1040, 1040A or 1040EZ and all schedules*: **Due on or before April 15, 2019**

** Parents or Guardians with full or partial ownership of a Business/Farm must upload all relevant schedules, including C or F (as provided).*

**Parents or Guardians involved in Partnerships or S-Corporations must upload their K-1, along with forms 1065 or 1120S (as provided).*

Do we need to reapply for tuition assistance each year?

Montgomery School requires families receiving tuition assistance to reapply each year. However, as long as the student remains at our School in good standing and balances from the current school year are paid in a timely manner, tuition assistance will be renewed each year according to demonstrated need. A change in factors such as income, family status, or the number of children attending private institutions may result in increases or decreases in an award. As stated earlier, Montgomery School believes that tuition should be considered a family's fiscal priority when applying for tuition assistance.

My spouse does not work. How will that affect my tuition assistance award?

Since it is our belief that families bear the primary responsibility for financing the education of their children, it is our policy to expect both parents to contribute financially. There are circumstances such as caring for a disabled or elderly parent or a preschool age child that would exempt a family from this policy. Each application and circumstance is evaluated.

I never do my taxes until close to the April 15th tax deadline. How will this affect my tuition assistance award?

We ask that you complete your SSS Personal Financial Statement (PFS) and Tuition Assistance Application using income information available from your 2018 W2s and 2018 end of year paystubs. 2018 1040s should be uploaded to SSS on or before April 15, 2019, but awards will be made prior to that date based on the information you provide on your PFS, Tuition Assistance Application, W2s and paystubs. If information reported on your 1040 differs significantly from what you have reported on your PFS or Tuition Assistance Application, Montgomery School reserves the right to re-evaluate your tuition assistance application and change the award based on the information reported on your 1040.

How will I be notified of my award amount?

Families will be notified in writing of their tuition assistance awards in late February and early March, 2019. Returning students will receive a re-enrollment contract in January that reflects the full amount of tuition. Contracts are to be signed and returned with the deposit by the return deadline in February. Due to an increased demand, we are not able to reserve tuition assistance for families who have not returned their enrollment contracts by the deadline stated therein. A new, revised contract will be issued when the tuition assistance award is determined.



Instructions for Completing the Tuition Assistance Application Process

We partner with School and Student Services (SSS) by NAIS in our tuition assistance process. To begin your tuition assistance application, you will complete SSS's Parents' Financial Statement (PFS).

The PFS is a comprehensive application that will take some time to complete. Give yourself the time you need by not waiting until the deadline to begin. You'll need your most recent tax return before beginning the PFS. We also recommend that you review the wide range of materials that SSS has put together to help families with the tuition assistance process. They can be found at sssbynais.org/parents.

We will communicate our tuition assistance decision to you. To make our decision, we use the information from the PFS as a starting point but also consider our school policy, practices, and available budget.

HOW TO COMPLETE THE PARENTS' FINANCIAL STATEMENT (PFS) ONLINE

- Go to sssbynais.org/parents.
- Create your PFS Online account with your email address and a password. If you applied for tuition assistance last year, simply login to the PFS Online as a Returning Family, using the email address and password you set up last year.
- Begin a PFS for Academic Year 2019-20. You can log out of the PFS Online at any time, then return later to complete it.
- After you have pressed submit, you'll be brought to a payment screen. The fee of \$51 is nonrefundable. Once your PFS is submitted, it cannot be withdrawn from the SSS system.
- After you pay for and submit your PFS, you'll have access in the PFS Online to a section called "My Documents." You can upload the additional documents we require there.

HOW TO SUBMIT ADDITIONAL REQUIRED DOCUMENTS ONLINE

- Prepare your documents to be uploaded. Make sure the documents are on your computer, each saved as a separate file. Remove any security or password protection from your document files.
- Return to the PFS Online and login.
- Select the Academic Year 2019-20 button.
- From the PFS Online, click on the "My Documents" tab.
- On the "My Documents" page, you will see an upload button or a hyperlink next to a specific document name in the "Required Documents" section of the PFS. Clicking either the upload button or a hyperlink will lead you through a series of steps allowing you to name, locate and save the file.
- Once you have uploaded a document, the date will appear in the "Date Uploaded" column within minutes of the upload. Some tax documents go through a verification process. It can take up to 48 hours for the verification process to complete.

If you wish to submit required documents by mail, send to School and Student Services, PO Box 449, Randolph, MA 02368-0449. For overnight service, use: SSS by NAIS, Application Processing Center, 15 Dan Road, Suite 102, Canton, MA 02021. **If you need help completing the PFS, contact SSS customer service at (800) 344-8328.**

HERE'S KEY INFORMATION YOU NEED TO KNOW ABOUT OUR SCHOOL AS YOU COMPLETE THE PFS:

Our school's full name:
Montgomery School

Our school's SSS code:
5170

Contact information for our tuition assistance office:
Deb Goggins 610-827-7222, ext. 215 or dgoggins@montgomeryschool.org

Due date for completing Montgomery School's Application for Tuition assistance and the PFS:
January 15, 2019

Documents we require you to upload, in addition to the PFS:

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| 1. Montgomery School's Application for Tuition Assistance: | Due January 15, 2019 |
| 2. 2017 1040, 1040A or 1040EZ and all schedules*: | Due January 15, 2019 |
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