



# Financial Aid at The Montgomery Academy

**The Montgomery Academy develops leaders committed to honor, scholarship, service and the pursuit of excellence.**

Financial aid is available for all students at The Montgomery Academy. Financial aid applies to tuition only. The process to apply for financial aid requires several steps. In order to ensure you receive full consideration, please complete the process as soon as possible. The deadline for early decision notification for currently enrolled families is **December 17, 2019**. The deadline for new families is **January 31, 2020**.

To be considered for financial aid, you must complete a financial aid application each school year. If your child is a new student, he or she must have been accepted for enrollment to The Montgomery Academy prior to any financial aid being awarded.

The Montgomery Academy utilizes the services of **School and Student Services (SSS)**, an organization which assists in financial aid recommendations. The SSS organization does not award financial aid. SSS assists NAIS member schools throughout the nation in making recommendations as to the amount of money a family can contribute toward a child's education.

We will communicate our financial aid decision with your child's enrollment contract. To make our decision, we use the information provided in the SSS PFS as a starting point. We also consider school policy and practices, as well as the available funds for financial aid within the budget.

If a child's parents are divorced, both custodial and non-custodial parents (if a parent or both parents are remarried) must submit all financial aid documents. Please note that all information is confidential. The Montgomery Academy abides by the NAIS Principles of Good Practice as they pertain to financial aid administration.

Please review all financial aid procedures outlined in this document. Information can also be found online at **[www.montgomeryacademy.org/financial-aid](http://www.montgomeryacademy.org/financial-aid)**

*The Montgomery Academy admits students of every color, gender, national or ethnic origin, religion, sexual orientation, or other legally protected status to all the rights, privileges, programs, and activities generally accorded or made available to students at the school.*

# The Montgomery Academy

## Application for Financial Aid

Please sign and return this form when requesting financial aid to Director of Admissions, 3240 Vaughn Road, Montgomery, AL 36106. The Financial Aid Committee will keep the information from this form, as well as other forms, strictly confidential. If you are requesting financial aid for more than one child, please list each child on this form.

NAME OF STUDENT(S): \_\_\_\_\_

GRADE(S) FOR 2020-2021: \_\_\_\_\_

Applications will not be considered until valid 2018 federal and state tax returns and W-2s are received.

**Please note:** Financial aid for the 2020-2021 school year will be calculated using the family's 2018 tax return.

I understand that submitting false information to The Montgomery Academy and/or SSS in an attempt to obtain a larger financial aid award than I would otherwise receive is an act of fraud.

I further understand that any attempt to defraud the financial aid program will result in permanent ineligibility for any of my children to receive financial aid now or in the future.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### **For Students in Grades 7-12: Policies Affecting Students Who Receive Financial Aid**

It is important to us that your privacy is honored and that your financial arrangements with The Montgomery Academy are kept confidential. However, there are certain situations that are exceptions to this policy.

1. There are several discounts available to students who receive financial aid awards. In order for your student to receive these discounts, the following MA administrators must be advised of students who receive financial aid **but only if you apply for a discount**.
  - a. Registrar (Discounts on testing fees, college applications, etc.)
  - b. College Advising (Discounts on testing fees, college applications, etc.)
2. In order to comply with the Alabama High School Athletic Association rules for eligibility, the Athletic Director will be given a list of all **new** students in **grades 7-12** who receive a financial aid award. The AHSAA rules for eligibility are included on the MA website. Please contact Gary Nelson, Athletic Director, at 334-272-8210 if you need further explanation.

# Applying for Financial Aid

## 2020-2021 Academic Year

We partner with School and Student Services (SSS) by NAIS in our financial aid process. To begin your financial aid 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 financial aid process. They can be found at [sssbynais.org/parents](http://sssbynais.org/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 but also consider our school policy, practices and available budget.

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

- Go to [www.solutionsbySSS.com/parents](http://www.solutionsbySSS.com/parents). Click on the green "Complete Your PFS" button.
- Create your PFS Online account with your email address and a password. If you applied for financial aid 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 2020-2021. 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 \$49 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 (listed below) we require.

### 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 2020-2021 button.
- From the PFS Online, click on the "My Documents" tab.
- On the "My Documents" page, you will see an upload button or 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.

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*If you wish to submit required documents by mail, please send to Director of Admissions, 3240 Vaughn Road, Montgomery, AL 36106.*

### The following is key information you need to know about our school as you complete the PFS:

Our school's full name: The Montgomery Academy

Our school's SSS code: 5158

Contact information for assistance: Rachael Gallagher, 334-273-7155, [rachael\\_gallagher@montgomeryacademy.org](mailto:rachael_gallagher@montgomeryacademy.org)

### Documents we require you to submit, in addition to the PFS:

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| ____ Copy of complete Federal and State 2018 Tax Return (signed) | ____ Copy of December 2018 Leave and Earnings Statement (if applicable)        |
| ____ Copy of all W-2s and 1099s for 2018                         | ____ Copy of all K-1s for 2018 plus Form 1065 and/or Form 1120 (if applicable) |
| ____ Copy of Mortgage statement or Rental agreement              | ____ Copy of Business/Farm Statement (if applicable)                           |
| ____ Copy of car notes for each vehicle listed on PFS            | ____ Copy of Student's 2018 Tax Return, W-2, and 1099s (if applicable)         |
| ____ Copy of parental student loan statements, if any            |  |
| ____ Copy of last month's bank statement                         |  |