

## FINANCIAL AID APPLICATION CHECKLIST

Applications for financial aid are not complete until **all** the following items have been submitted. Students' eligibility for aid cannot be evaluated until the aid application is complete. Much of the financial aid budget is allocated by the end of May. Late applicants should contact the Office of Admissions to learn about current aid availability.

### By February 1, 2010:

- Complete the Parents' Financial Statement (PFS)** online at: <http://sss.nais.org>.  
You may also download a paper copy and mail it to School and Student Services (SSS).  
**If your taxes are not complete, complete the PFS using estimates.**

### By March 1, 2010, send the following items to SSS:

#### By mail:

SSS by NAIS  
Application Processing Center  
PO Box 449  
Randolph, MA 02368

#### By overnight courier:

SSS by NAIS  
Application Processing Center  
437 Turnpike Street  
Canton, MA 02021

- Copy of 2009 Federal Tax Form 1040 **with all supporting schedules and forms**
- Copy of W-2 Form(s)
- Copies of tax returns, if any were filed, for the children for whom you are applying for financial aid

#### Additional Tax Form:

- IRS Form 4506-T, "Request for Copy of Tax Form". Complete items 1-4 and the signature block, but please **do not** date the signature. Then mail to CWA directly. Do not include any fee. [Click here](#) for form.  
Charles Wright Academy  
7723 Chambers Creek Road W  
Tacoma, WA 98467

### **ATTN: Owners/Part-owners of businesses, farms, partnerships and/or corporations must also submit:**

- Copies of the following documents as appropriate for your situation:
  - o Schedule C: Sole proprietors
  - o Schedule F: Profit or Loss from Farming
  - o Form 1065: US Tax Return of Partnership Income
  - o Form 1120: US Corporation Income Tax Return
  - o Form 1065 or 1120S Schedule K-1
- Copies of any other documents submitted as part of your tax return or in support of your tax return.

## **ATTN: Military Families**

If one or both parents are in the military, a copy of your December 2009 leave and earnings statement(s) must be submitted.

## **ATTN: Parents who are Divorced/Separated/Never Married:**

Charles Wright Academy requires both parents to participate in the financial aid application process. Hence, we ask both parents to submit tax documents and submit a PFS. Please contact the Admissions Office if either parent needs additional information or instructions.

## **Tips for Completing the PFS:**

### **1. Attend one of the Financial Aid Workshops.**

- Tuesday, January 12, from 7:00 pm to 8:30 pm in the Middle School
- Saturday, January 16, 10:30 am to 12:00 pm in the Middle School

At the workshops we will offer “Financial Aid 101” which includes the basics of how financial aid works, and line-by-line help with completing the Parents Financial Statement.

### **2. Submit the Parent Financial Statement (PFS) ONLINE.** SSS accepts both on-line and paper form submission. We recommend online submission because the fee you pay is slightly lower and the data gets to Charles Wright more promptly.

### **3. Read the instructions for each item.** The instructions will answer most questions but if you have questions about how to fill in the PFS, you can direct questions to the SSS Customer Service Center by calling (800) 344-8328 Monday-Friday 9am-8pm; Saturday 9am-4pm. (All times EST)

### **4. Special Circumstances. We recognize that every family’s financial reality is unique.** For special circumstances not covered by the PFS, we encourage you to send a separate written explanation to the Admission Office.

### **5. Provide copies of your complete tax return.** This includes not only the form 1040 but also all W-2’s, schedules, and forms – in short, any form you submitted to the IRS as part of your return, or that you completed in support of your return. If you have questions about whether Charles Wright requires a form, please call the Admissions Office.

### **6. Keep copies of all financial aid forms and supporting documents.**

For more information or with questions, please contact the Admissions and Financial Aid Office: (253) 620-8373.