



TUITION ASSISTANCE PROGRAM 2023-2024

PROGRAM DESCRIPTION

Montessori de Terra Linda's budget provides limited funds for Tuition Assistance so that the ability to pay full tuition will not be a deciding factor in admitting students to the school. This assistance is intended as a supplement to family resources, and awards are made to students of families whose ability to pay school costs is limited. The Tuition Assistance Committee administers the Program. Assistance decisions are made independently from admission decisions and in no way affect an applicant's chances for admission. The Tuition Assistance Program is open to students of any race, color, national and ethnic origin. **Awards are available for children beginning in the 3rd year of the Primary program. Exceptions are made for 2nd year Primary children where an older sibling is enrolled at Montessori de Terra Linda (MdTL).** MdTL does not make awards for non-contracted after school care, before care or holiday/summer camp fees.

HOW TO APPLY

Please file the Parent Financial Statement (PFS) online at School and Student Services (SSS) by NAIS website: <https://sssandtadsfa.force.com/familyportal/>. **The SSS code for Montessori de Terra Linda is 3300.** Also file a signed IRS form 4506, which authorizes MdTL to obtain a copy of the filed Form 1040 for the 2022 tax year along with all filed schedules and attachments. Do not attach a check for the fee for this form. MdTL will pay this fee if MdTL deems it necessary to file the form. There are a limited number of fee waivers available for families who cannot afford the application fee for SSS. The waivers are available on a first-come, first-served basis and eligibility is determined by SSS. For questions, contact the Business Office at businessoffice@mdtl.org or 415 479-7373, ext. 104. **By April 17, 2023, upload your 2022 tax return (1040 and all schedules) to the SSS website.**

POLICIES

Selection: MdTL follows the guidelines for evaluation of financial need established by MdTL and SSS for Tuition Assistance. The Tuition Assistance Committee considers a number of factors when deciding on a grant. These factors include the determination of need by SSS, number of school-age children and a variety of other factors including school funds budgeted for assistance and the number of applicants. Because there are so many variables, it is difficult to predict what, if any, the amount of a grant might be. In the 2022-23 school year, approximately 35 awards representing 21% of our students were granted, ranging from 19% to 88% of tuition.

Continuing Students: Awards are granted on an annual basis and, therefore, do not roll over from one academic year to the next. Returning student applicants must meet the deadlines and standards of documentation, as must first-time applicants. Because of the varying resources of MdTL and of the applicant, and the changing composition of the applicant pool, awards vary from year to year. ***Please note* Applications for students reapplying for Tuition Assistance will not be considered unless all tax documents from the prior year's application have been received.**

Applicants (Not Yet Enrolled at MdTL): Families of students applying to MdTL may apply for Tuition Assistance once they have submitted an enrollment application with payment of the \$100 application fee. However, funds for new students may be limited (see "*Priorities*").

Arrears: Awards will not be made to families in arrears on their account with MdTL for the current academic year. Any award is made conditional upon the family continuing to pay charges to their account when due.

Priorities: Subject to the availability of funding, MdTL gives preference to timely applications for assistance (see the deadlines listed in the *"Application Procedures & Calendar"* in the Tuition Assistance packet) in the following order:

- a) Returning students already receiving Tuition Assistance
- b) Returning students applying for Tuition Assistance for the first time
- c) New students
- d) Applications submitted after the designated deadlines

Family Resources: MdTL considers the income and assets of both parents to arrive at an award, and will not be bound by the assertion that one parent has disclaimed responsibility for educational expenses. If the custodial parent has remarried, the income and assets of the step-parent will be considered, bearing in mind the obligations that individual might have to his or her own children. Parents are assured that all information submitted will be kept in strictest confidence and that such information will not be shared with either family. Any financial support that may be available beyond the parents' income and assets should be reported in the appropriate section of the SSS application. These might include resources from grandparents or other relatives.

If there are circumstances that a family believes might warrant waiving this requirement, a written request for a waiver should be submitted to the Tuition Assistance Committee.

Confidentiality: MdTL will refrain from making any public announcement of the amount of Tuition Assistance awarded to a student. MdTL will safeguard the confidentiality of all financial information supplied by a family.

AWARDS

Awards are given to students of those families who have demonstrated need. Awards are given to individual students and are not transferable to siblings or other students. **Awards are available for children beginning in the 3rd year of the Primary program. Exceptions are made for 2nd year Primary children where an older sibling is enrolled at MdTL.**

Before accepting an enrollment contract with a Tuition Assistance award, a family must judge whether the award is adequate and that they can pay the balance of tuition and other charges when due.

Contracts with awards **MUST** be returned to MdTL before the expiration date on the offered Enrollment Contract. **MdTL does not hold places or Tuition Assistance awards for students who do not return Enrollment Contracts by their due date.**

FINANCIAL EMERGENCY

If a family experiences a major change to its financial position that makes payment of agreed tuition a significant hardship, we ask that you write to the Tuition Assistance Committee explaining your need for assistance, how much you need, and your proposed payment plan. The Committee will review the request and make an emergency award of assistance only if a compelling case has been made and if there are funds available in MdTL's budget to do so. In an emergency, do not delay. We can only offer help if you communicate your need.



TUITION ASSISTANCE PROGRAM 2023-2024 APPLICATION PROCEDURES AND CALENDAR

Tuition Assistance online applications are available after December 1.

Complete the Parent Financial Statement (PFS) and IRS Form 4506. The PFS must be completed online at <https://sssandtadsfa.force.com/familyportal/>. You do not need to submit a check for the IRS Form 4506. By April 14, 2023, upload your 2022 tax return (1040 and all schedules). If applying for an extension for filing your return, upload a copy of your extension application.

The SSS code for Montessori de Terra Linda is 3300.

Returning Students

January 13, 2023: Re-enrollment Information Form Deadline and Tuition Assistance Priority Deadline.

All re-enrollment forms are due by this date. A space will be saved for **Returning Students** who have applied for Tuition Assistance. Subject to continued satisfactory academic performance and prompt payment of current amounts due to the School, a place will be held for the student until the application for Tuition Assistance has been processed. We can only consider your need for Tuition Assistance if you submit the required forms. Complete the PFS and IRS Form 4506 online at <https://sssandtadsfa.force.com/familyportal/>.

January 30, 2023: Re-enrollment Contracts Emailed

On this date, contracts will be emailed to **returning students** showing the Tuition Assistance Award offered by the School. If you have not submitted an application for Tuition Assistance, the School will offer a full tuition enrollment contract for your child. These must be returned before the due date. **Awards are not valid after the Contract due date.**

February 9, 2023: Enrollment Contracts Due

MdTL does not hold places or Tuition Assistance awards for students who do not return Enrollment Contracts by their due date.

Siblings & New Students

January 27, 2023: Tuition Assistance Priority Deadline for Siblings & New Students

March 7, 2023 for 2nd Year Primary (only applicable for Siblings)/March 16, 2023 for K – 6th: Enrollment Contracts Emailed

For **Siblings & New Students** who are offered enrollment and applied for Tuition Assistance by **January 20, 2023**, the Tuition Assistance award will be included in the Enrollment Contract, if available.

March 14, 2023 by 10AM for 2nd Year Primary/March 23, 2023 by 10AM for K – 6th: Enrollment Contracts Due
MdTL does not hold places or Tuition Assistance awards for students who do not return Enrollment Contracts by their due date.

April 17, 2023: Copies of Tax Returns Due

Custodial and non-custodial parents of all applicants must upload a copy of the actual 2022 Federal Tax Form 1040 and attached schedules. If applying for an extension for filing your return, upload a copy of your extension application.