

Financial Aid Policy of St. Luke Lutheran Church & School

Financial Aid is available to those who qualify and is administered through the School Board of St. Luke Lutheran Church & School. It is our hope that no one be denied a Christian education due to the lack of funds. However, financial aid is not to be considered a scholarship, but rather should be sought only by those in significant financial need.

Financial Aid application requirements:

1. **All families** who are seeking financial aid must complete a *Request for Financial Aid* (green form) from the school office by April 30 each year. **This includes all new and renewal applicants.**
2. **All families** who are seeking financial aid must complete an online *FACTS Aid Assessment* application and pay the \$40 processing fee by April 30. The application must be completed online at <https://online.factsmgmt.com/aid>. **This includes all new and renewal applicants.**
3. If a new family applies for enrollment after April 30, and the family is seeking financial aid, a *Request for Financial Aid* form and a *FACTS Aid Assessment* must be completed within 10 days of application.
4. All financial aid applicants are strongly encouraged to apply for an EITC scholarship to the Community Foundation (if available) before the **July 15** deadline each year. Applications will be accepted online beginning March 15, 2023 at <https://servingtheheart.org/pre-k-12-tuition-assistance/pre-k-12-tuition-assistance.html>. **This includes all new and renewal applicants.**
5. All applications will be reviewed by the Financial Aid Sub-Committee. Meetings may be scheduled with applicants at the discretion of the School Board.
6. The Financial Aid Sub-Committee will consider several criteria in determining the appropriate amount of financial aid to be granted. These criteria will include the currently established guidelines, review of the FACTS assessment, and any special individual circumstances.
7. The Financial Aid Sub-Committee, in consultation with the principal, shall have the final authority to approve all financial aid requests.

Important points to remember:

- In addition to first completing a *Request for Financial Aid* (paper) form from the school office, all applicants then must complete a FACTS financial aid assessment online at <https://online.factsmgmt.com/aid>. Links are also provided on our website at www.school.stlukecabot.org; look under *Current Parents/Students or Prospective Parents/Students*, then click on *Financial Aid*.
- All applications will be reviewed by the School Board Sub-Committee for Financial Aid. The Sub-Committee will contact you if they have any questions or you may request a conference.

In keeping with the long-standing policy of St. Luke Lutheran Church and School, it is our goal that no one be denied a Christian education for financial reasons. In order to apply for financial aid, complete the following application. Please attach a copy of your **2022 Federal Income Tax Return**. If you do not file a federal tax form, please contact the school office for further instructions. Please explain any extenuating circumstances which further explain your situation. Applicants must then complete a FACTS financial aid assessment online at <https://online.factsmgmt.com/aid>. Links are provided on our website at www.school.stlukecabot.org under *Current Parents/Students* and *Prospective Parents/Students*, then click on *Financial Aid*. **Applications must be received by April 30, 2023.** All applications will be reviewed by the School Board Sub-Committee for Financial Aid. The Sub-Committee will contact you with any questions or you may request a conference.

Parent’s mailing address and phone number:

Name: _____ Address: _____

Best time to call: _____ Home Phone: _____ Work Phone: _____ Cell Phone: _____

Name(s) of Student(s):

1. _____

Last	First	Grade level	Tuition/Year
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2. _____

Last	First	Grade level	Tuition/Year
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3. _____

Last	First	Grade level	Tuition/Year
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Family Information:	Father	Mother
Name		
Occupation		
Employer		
2022 Gross Income		
Estimated 2023 Yearly Gross Income		
Home Congregation		
Pastor’s Name		

Please list all other household income/resources for 2023-2024: _____

Other dependent children in the family:

- | | Full Name | Date of birth | Grade level |
|----|-----------|---------------|-------------|
| 1. | _____ | | |
| 2. | _____ | | |
| 3. | _____ | | |

Please give any additional information which you feel will assist us in our consideration of your need for financial aid

(use additional pages if needed): _____

Applicant Name _____ Phone _____

Costs assessed for 2023-2024:

Tuition _____ **Enrollment Fee** _____

Grade _____ \$ _____ Enrollment Fee **\$150 per family**

Grade _____ \$ _____

Grade _____ \$ _____

Total Tuition \$ _____

Enrollment Fee **\$150.00**

The Enrollment Fee is considered separate and exempt from financial aid and is to be paid upon enrollment/re-enrollment. Financial aid applies only to tuition, not to the Enrollment Fee.

State the amount of tuition you feel you can pay during the year: \$ _____

State the amount of financial aid you are requesting: \$ _____

Parent's Signature _____ Date _____

Parent's Signature _____ Date _____

Guidelines for requesting financial aid:

- ✓ *Please be sure to fill out all blanks completely.*
- ✓ *Please attach a copy of your 2022 Federal Income Tax Return. If you do not file a federal tax form, please contact the school office for further instructions.*
- ✓ *Please explain any extenuating circumstances which further explain your situation.*
- ✓ *Please be sure to indicate an amount you feel you can pay toward tuition.*

FACTS Grant & Aid Assessment

FACTS makes quality education affordable for families by assisting schools in awarding financial aid. We work with schools to create a custom application and collect financial data so schools can make accurate award decisions based on financial need.

To apply for financial aid, visit <https://online.factsmgt.com/aid>.

After completing the online application, you will need to upload all required supporting documentation.

The following supporting documents are required to complete the application process:

- IRS Federal Income Tax Return, including all supporting schedules (the year of the tax return depends on the tax requirements of your school). If applicant and co-applicant file separately, we require both tax returns for the same tax year.
- Copies of all the current year W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the current year W-2 Wage and Tax Statements, please submit them as soon as they become available.
- Copies of all supporting tax documents if you have business income/loss from any of the following:
 - Business - send Schedule C or C-EZ and Form 4562 Depreciation and Amortization
 - Farm - send Schedule F and Form 4562 Depreciation and Amortization
 - Rental Property - send Schedule E (page 1)
 - S-Corporation - send Schedule E (page 2), Form 1120S (5 pages), Schedule K-1 and Form 8825
 - Partnership - send Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
 - Estates and Trusts - send Schedule E (page 2), Form 1041 and Schedule K-1

IMPORTANT: If you file a tax return but do not have W-2 wages because you are self-employed, you will be required to submit a copy of your current year Federal Form 1040 Tax Return.

Copies of all supporting documentation for household Non-Taxable Income such as: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF). If you do not file a tax return, you are required to provide documentation of all income received.

All documentation received is imaged upon receipt and then destroyed. You may log in to your FACTS user account to review the status of your application. Please allow 2 weeks processing time before inquiring further about receipt and/or status of the uploaded documents. Application deadlines are set by the institution awarding the aid. If you are applying after the deadline, contact your school to ensure that your application will be accepted.

A non-refundable application fee of \$40 will be required before your application will be submitted.

Community Foundation Application for EITC Scholarship

To apply for the 2023 Community Foundation Application for EITC Scholarship, you must fill out the application online at <https://servingtheheart.org/pre-k-12-tuition-assistance/how-to-apply.html> . Application is available on March 15 through July 15, 2023.