

# The Berkeley School

## Financial Aid Policies, Procedures & Deadlines

### School Year 2010-2011

#### **PRINCIPLES**

The Berkeley School takes pride in providing a strong Financial Aid Program to its families. We are committed to providing access to qualified students, regardless of their financial situation. Financial aid is intended as a supplement to family resources, and is provided to families who have demonstrated financial need.

TBS follows the guidelines for the evaluation of financial need established by School and Student Services (SSS). SSS is a service of the National Association of Independent Schools. Based on the financial information you provide, SSS will report to us an estimated amount your family should be able to contribute toward tuition. This helps us make fair and objective financial aid decisions. Financial aid decisions are made independently of admissions decisions and do not affect an applicant's opportunity for enrollment. The financial aid program is open to students of any race, color, gender, gender identity of expression, religion, or national or ethnic origin.

TBS requires that all financial support available beyond the parents' income and assets be reported on the Parents' Financial Statement (PFS), including resources from grandparents, other relatives or benefactors.

The maximum award for students in the three- and four-year-old program is \$2,000.

TBS does not provide assistance for before- and after-school care or holiday or summer camps.

Financial aid is provided for individual students and is not transferable to siblings or other students. It is also not deferrable.

All financial aid applicants must meet stated deadlines and submit all documentation to be considered for funding. Because of the many variables, we cannot provide estimates of the amount of aid for which a family might be eligible.

Financial aid awards are made on a funds-available basis. Due to limited financial resources, financial aid is not guaranteed to all applicants who qualify. All families interested in applying for financial aid should follow the procedures and timeline outlined in this document.

PLEASE DIRECT QUESTIONS TO:

**Shira Freehling**

Director of Financial Aid  
(510) 665-8800, ext. 107

[sfreehling@theberkeleyschool.org](mailto:sfreehling@theberkeleyschool.org)

**Paula Farmer**

Director of Admission  
(510) 665-8800, ext. 103

[pfarmer@theberkeleyschool.org](mailto:pfarmer@theberkeleyschool.org)

## **POLICIES**

### ***Returning Students***

Financial aid awards are granted on an annual basis. Returning students and their siblings are considered priority applicants. All families must reapply each year, meet all stated deadlines, and complete all documentation. Because of varying resources available to the school and the changing composition of our applicant pool, aid awards may vary from year to year.

Families of current TBS students must not have any past due balance in 2009-2010 in order to be considered for a financial aid award for 2010-2011.

### ***New Applicants***

Families of new applicants to TBS should apply for financial aid on or before January 29. Your financial aid application will not be processed until your admission application has been received.

### ***Separate, Divorced, Non-Custodial or Unmarried Parents***

The SSS and TBS policy for determining financial need is based on the principle that all parents are responsible for the support and educational expenses of their children. Based on this principle, TBS' Financial Aid Committee evaluates the income and assets of all of a child's parents and/or family units.

TBS requires that all parents, including non-custodial parents, complete the financial aid application process for their child. Waiving this requirement requires third-party documentation. To find out more about waiving this requirement, please contact Shira Freehling [freehling@theberkeleyschool.org](mailto:freehling@theberkeleyschool.org) or (510) 665-8800 x107.

*All submitted information will be kept in strictest confidence. Such information is never shared with other family members.*

### ***Late Financial Aid Applications***

Financial aid awards are made on a funds-available basis. Because the requests for financial aid exceed available funding, financial aid is not guaranteed to all applicants who qualify. All families interested in applying for financial aid should be sure to follow the procedures and pay special attention to the timeline outlined in this document.

### ***Signed Enrollment Contracts***

Signed enrollment contracts **must** be returned before the stated expiration date on the contracts. After that date, financial aid funds will be released to other qualifying financial aid applicants.

### ***Confidentiality***

The Financial Aid Committee maintains strict confidentiality over financial aid files. Faculty and students are not informed of financial aid decisions. The School trusts that the family will have the same discretion regarding awards and decisions.

### ***Financial Aid Workshops***

It is strongly recommended that at least one family member attend one of the financial aid workshops. They will be held at TBS' University Avenue campus (1310 University Avenue).

- a. **October 27**, 2009 from 6-6:45pm (for current TBS families).
- b. **November 13**, 2009 from 6-7:15pm (for current TBS families and families new to TBS who are in the admissions application process).
- c. **December 8**, 2009 from 9-10:15am or from 6-7:15pm (for families new to TBS who are in the admissions application process).

*For assistance completing the Parents' Financial Statement, please call the School & Student Services Helpline at (800) 344-8326 (Mon-Fri 9am-8pm EST, Sat: 9am-4pm EST.) We suggest that you complete your application as thoroughly as possible before calling the Helpline.*

## HOW TO APPLY FOR FINANCIAL AID

**All parents, including separated, divorced, non-custodial or unmarried parents, must complete this process.**

1. Beginning **November 1**, 2009, log on to <http://sss.nais.org>. There is a \$35 application fee.
2. Click on the prompt to begin your Parents' Financial Statement (PFS). You will be given a password that will allow you to return to your PFS at a later date before submitting it. Keep track of your login and passwords, as you will use this information to view your PFS in future years.
3. The Berkeley School's code is **I598**. Enter this information in PFS item 7.
3. Be sure to submit your PFS by the appropriate deadline below:
  - a. **December 11** for **current** TBS families
  - b. **January 29** for families **new** to TBS
4. If this is your first time applying for financial aid at TBS, you are also required to mail a copy of your 2008 tax returns and W-2s by the deadline stated above to:  
SSS by NAIS Application Processing Center  
PO Box 449  
Randolph, MA 02368-0449

**Be sure to include a cover sheet with documents mailed to SSS.**

**The following deadlines apply to all applicants:**

5. **By February 15**, mail copies of your 2009 W-2's to SSS at the address above.
6. **By February 15**, mail a signed (but not dated) IRS Form 4506-T directly to:  
Shira Freehling, The Berkeley School, 1310 University Ave., Berkeley, CA 94702.  
  
IRS Form 4506-T is page 2 on the IRS website [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf)  
This form is also available in the TBS Business Office.  
Fill in lines 1-4.  
For item 5, fill in: Shira Freehling, Director of Financial Aid, The Berkeley School,  
1310 University Ave., Berkeley, CA 94702  
In item 9, fill in: 12/31/09.
7. **By March 15**, mail a copy of your 2009 income tax return, including all schedules and forms to SSS.  
(SSS should have already received your 2009 W-2's.)  
Mail these required documents to:  
SSS by NAIS Application Processing Center  
PO Box 449  
Randolph, MA 02368-0449
8. **By March 15**, if you are self-employed, also mail to SSS:
  - a. Business/Farm Statement
  - b. A copy of your signed 2009 tax return for your business. If you are applying for financial aid at The Berkeley School for the first time, please also include your 2008 income tax return for your business.
9. By signing the PFS electronically, parents indicate that they have filled out the PFS with the best available knowledge. They agree to inform the school of any changes in their financial situation. Any variance from this may jeopardize a student's financial aid grant, no matter what stage they are in the process. Additionally, the preliminary financial aid grants may be adjusted once the file is complete.

## HELPFUL HINTS

1. Adhere to deadlines. Once the 2010-2011 financial aid budget is awarded, no additional applications will be considered.
2. You only have to complete one PFS, even if you have several children applying for financial aid at The Berkeley School and/or other SSS subscriber schools. For item 7 of the PFS, The Berkeley School's code is **1598**. To request the Report of Family Need, add code 9000 and Family Report to item 7 of the PFS.
3. Fill in whole dollar amounts only, rounding up or down.
4. Do not wait to complete your tax return before you complete your PFS.
5. Use good faith estimates for items where you may not know the exact number.
6. Some items require a brief explanation. Please fill in those spaces provided. Missing explanations may delay and/or alter your child's financial aid award.
7. Any additional information or special circumstances the family would like to make known may be conveyed in a letter to the Financial Aid Committee c/o Shira Freehling, The Berkeley School, 1310 University Ave., Berkeley, CA 94702 or by email to [sfreehling@theberkeleyschool.org](mailto:sfreehling@theberkeleyschool.org)
8. Keep track of your SSS login and passwords, as you will use this information to view your PFS in future years.
9. IRS Form 4506-T is page 2 on the IRS website [www.irs.gov/pub/irs-pdf/f4506t.pdf](http://www.irs.gov/pub/irs-pdf/f4506t.pdf)  
Fill in lines 1-4.  
For item 5, fill in: Shira Freehling, Director of Financial Aid, The Berkeley School, 1310 University Ave., Berkeley, CA 94702  
In item 9, fill in: 12/31/09.  
Sign, but do not date the form.  
Please mail it to the above address.  
Do not mail Form 4506-T to SSS by NAIS or to the IRS.
10. Many families find that referencing last year's form is helpful in filling out this year's form. We suggest you print out a copy of your PFS for future reference.

## WHAT HAPPENS NEXT?

Once the PFS and 2008 tax documents have been received by SSS, The Berkeley School's Financial Aid Committee will review each file. TBS bases our preliminary grants on the information provided on the PFS and the Report of Family Contribution (RFC.) The family's 2009 Federal income tax return will provide additional information which may cause the school to adjust the preliminary award. In some cases, the Financial Aid Committee may find that additional information needs to be gathered from applicants and reserves the right to set up a financial aid interview in order to more accurately understand the applicant's situation.

Families who file the PFS and required documents on time will receive their preliminary award information in the admission decision packet. Assistance will be based on the information provided and offered on a provisional basis until a copy of the filed 2009 return is provided. Failure to provide tax returns, W-2's and schedules may result in the withdrawal of any provisional assistance offered.