

BERKELEY ROSE SCHOOL

Affordable Tuition Program Information, Instructions, and Supplemental Form for 2016-2017 School Year

Berkeley Rose School is committed to sustaining cultural and socio-economic diversity. Each year Berkeley Rose School offers reduced tuition to the maximum number of students possible through our Affordable Tuition Program (ATP). Families who are committed to providing a Waldorf education for their children but are concerned about their ability to pay should consider applying for financial aid.

In order to fairly determine a family's financial need, the school uses a needs-analysis program developed by the School and Student Service for Financial Aid (SSS) developed by the National Association of Independent Schools (NAIS). Total income, assets, number of dependents, cost of educating all children in fee-charging institutions, extraordinary expenses, and retirement needs are all taken into consideration. In addition, we carefully consider individual circumstances made known to us in the school's own supplemental form.

Enclosed you will find Berkeley Rose School's Affordable Tuition Program information, instructions and the request/supplemental form. The ATP Committee will allocate financial aid awards by late February for returning families and in mid-March with decision letters for newly accepted families.

Again, please read the instructions carefully and pay close attention to the deadlines. If you have any questions or need assistance as you complete the application process, please contact Robert Schorlemmer at (510) 859-7679 (robert@berkeleyrose.org).

This document explains the steps necessary to complete an application for the ATP at Berkeley Rose School, which is **due by January 29, 2016**. Applications received after the January 29th deadline will only be considered in the event funds are still available. In brief, the following documents are needed and can be found on the Berkeley Rose web site, berkeleyrose.org, under the "Admissions" tab, "Tuition Assistance":

- 1) **Parent Financial Statement:** Complete on-line at the School of Student Services (SSS) by NAIS website.
- 2) **Supplemental Form:** Fill out and submit pages 3 and 4 of this document to the Berkeley Rose School office and submit **a copy of your final paycheck stub for 2015** to SSS by January 29th.
- 3) **All other required financial documents** to SSS by their respective due dates (see below).

INSTRUCTION FOR APPLYING FOR FINANCIAL AID

Complete the online Parents' Financial Statement (PFS) according to the instructions at sssbynais.org/parents/ by January 29, 2016. Please be sure to explain in the Notes section all items that ask you to "Click here to add your explanation." **The school SSS code for Berkeley Rose School is 161011.** You do not have to complete the entire application in one session. Your user name and password will allow you to access and edit your data until you have submitted the online PFS and completed the payment section. The SSS Helpline number is (800) 344-8328. As part of the application process, in addition to completing an online application, you are asked to upload digital copies of personal financial documents to SSS. If you cannot create digital copies for upload please call the Berkeley Rose School office at (510) 859-7679 for assistance.

Alternatively, you may mail copies of your financial documents to SSS. Please take into account that if you mail your documents, they may not be available online to the School for a couple of weeks after mailing. Therefore, please mail documents no later than January 8, 2016. Remember to include the SSS Document Cover Sheet, available at <http://sssbynais.org/parents/apply>. Scroll down to the bottom of the page and select the download link under "Required

Documents Cover Sheet.” Be sure to fill in the 2016-17 PFS Identification Number in the spot provided; this number will insure that your documents are linked to your online PFS.

Be sure to print out or photocopy and retain a copy of your completed PFS for reference should SSS or Berkeley Rose School have need to contact you for discussion or clarification.

Documents that need to be submitted with your application include:

- a. A copy of your final 2015 paycheck stub by 1/29/16, if you have one, uploaded to the SSS website.
- b. A copy of your 2015 W-2/1099 form(s) and 2014 tax forms uploaded to the SSS website by – 2/19/16.
- c. A copy of your 2015 Federal tax forms and schedules, including all 2015 tax forms related to a business or corporation uploaded to SSS no later than – 4/29/16.

All documents and forms, except for the attached supplemental form, must be submitted to SSS and *not* to the school.

For regular mail:

SSS by NAIS
Application Processing Center
P.O. Box 449
Randolph, MA 02368-0449

For overnight mail:

SSS by NAIS
Application Processing
15 Dan Road, Suite 102, Canton, MA 02021

Any discrepancy between your income tax returns and the information on the application materials submitted in January may result in a reduction or retraction of your Affordable Tuition Grant.

PFS forms and required supporting documentation submitted to SSS after either the January 29, 2016 online deadline or the January 8, 2016 postmark deadline will result in a late application. Late applications will be processed only if funds are available.

INFORMATION FOR PARENTS WHO ARE SEPARATED OR DIVORCED

Berkeley Rose School’s policy requires that separated or divorced parents requesting financial aid must BOTH complete financial aid forms. This includes the custodial and non-custodial parent. Each parent is required to submit all the documents stated above by January 29, 2016.

Berkeley Rose School’s policy in determining the financial need of students whose parents are separated or divorced is as follows: Remarriage of either parent creates a new family unit with new relationships but we believe that natural (or original adoptive) parents still have a responsibility for educational expenses despite any legal agreements to the contrary. Therefore, the income, expenses, assets and liabilities of the entire new family unit are considered in addition to the natural (or adoptive) parent’s ability to contribute to the cost of education.

The term custodial parent refers to the parent with whom the student resides (or resided with most during the 12 months prior to the date of the application). The other parent is referred to as the non-custodial parent even in cases where parents legally share joint custody. Please remember that under joint custody, both parents are jointly liable for the full amount of tuition owed.

The School wishes to minimize any potential problems students might encounter as a result of this policy, so the Affordable Tuition Program Committee will gladly consider any special circumstances that might prevent compliance, such as:

1. The location of the non-custodial parent is unknown.
2. The non-custodial parent has had no contact with the family for more than three years.

Parents are assured that all information submitted is kept in the strictest confidence. Note: We will not be able to review a financial aid application until all the information required by the deadline is received.

AFFORDABLE TUITION PROGRAM (ATP) REQUEST FOR 2016-2017
Berkeley Rose School (SSS code 161011)

Please submit this page, front and back, to the Berkeley Rose School office by January 29, 2016.

A) _____
Name of Student and 2016-2017 Grade
 New Applicant Current Student Current Student on ATP

B) _____
Name of Student and 2016-2017 Grade
 New Applicant Current Student Current Student on ATP

C) _____
Name of Student and 2016-2017 Grade
 New Applicant Current Student Current Student on ATP

D) _____
Name of Student and 2016-2017 Grade
 New Applicant Current Student Current Student on ATP

Name of parents or guardians completing forms: _____
In the case of divorced or separated parents, each parent/guardian must complete all forms.

Important deadlines:

January 29, 2016: Complete online PFS (sssbynais.org) and upload a copy of final 2015 paycheck stub to SSS; submit ATP Request/Supplemental Form to the Berkeley Rose School office.

February 19, 2016: Submit copy of 2015 W-2/1099 forms and 2014 Federal Tax Forms to SSS.

April 29, 2016: Submit copy of 2015 Federal Tax Form 1040 to SSS.

Families who have completed the ATP application on time will be given priority consideration for financial aid funds. Late applicants will only be considered in the event funds are still available.

Please complete the Supplemental Financial Aid Form on page 4 (the reverse side).

ethnic group with which you identify as well as that of your child. You may add as much detailed information as you wish:

- African/African American Asian/Asian American Caucasian Latino/Hispanic
 Native American Pacific Islander Multiracial: _____