

Indexed Tuition Procedures *Process & Timeline*

The
San Francisco School
Founded 1966



Academic Year 2008-2009

To apply for Indexed Tuition at The San Francisco School, you will need the following packet of information:

- The San Francisco School Indexed Tuition Policies
- The San Francisco School Application for Indexed Tuition
- SSS/NAIS *Family Guide to Financial Aid* (available in October from The School or online at www.nais.org/financialaid/sss)
- SSS/NAIS *Parents' Financial Statement (PFS) with Instructions* (available in October from The School or online at www.nais.org/financialaid/sss)
- *PFS Online Instructions*
- IRS Form 4506

If applicable, please fill out online or request the following additional forms:

- A second *Parents' Financial Statement (PFS)* if you are separated, divorced or have a financially responsible parent/guardian in another household (there is no longer a different form). Both parents/households must fill out and send an **original** copy of the PFS
- If you own a business or farm, *The Business/Farm Statement*

If you have questions about how to complete any of the information, please contact Miriam Phillips, Business Manager, (415) 239-1410 (mphillips@sfschool.org).

Assessment of Financial Need The amount that a family should be able to contribute toward tuition is based upon the Parent Financial Statement (PFS), the Application Form, and current federal tax returns.

Parents' Financial Statement (PFS) Parents can either complete the PFS online or fill out and mail a hard copy directly to ETS in Pittsburgh, PA. A copy of the PFS is also submitted to The School. The underlying assumption of SSS is that parents have a primary obligation to finance their children's education to the extent they are able. The amount computed for each family's contribution of tuition is based on a "modest standard of living" as defined by the Bureau of Labor Statistics. Total income, assets, number of dependents, age of parents, provision for retirement and extraordinary expenses are all taken into account in assessing a family's ability to pay educational expenses. It takes several weeks for the SSS to process the required forms and send their assessment to The School. It is advantageous for families to send the forms as **early** as possible.

Application Form Families submit the *Application for Indexed Tuition* directly to The School. This document provides families an opportunity for individual communication of special circumstances.

Income Tax Return Applicants must submit a copy of their 2007 *Federal Income Tax Returns*, with accompanying schedules, attachments and copies of recent W-2, directly to The School. A signed copy of The Internal Revenue Service Form 4506 must also be submitted to the School along with the other required forms. (No check is required). This form is a release from the applicant to the IRS allowing the SFS to obtain a copy of the filed tax return.

Indexed Tuition Timeline and Checklist

To be considered in the first round of Indexed Tuition decisions, please follow the below timeline:

Date / Deadline	Who	What
Beginning mid-October 2007	Parents	<p>Pick up Indexed Tuition Packet from the front desk during school tour or access SFS materials online at www.sfschool.org/admissions/tuition and PFS form online at: www.nais.org/financialaid/sss</p> <ul style="list-style-type: none"> • If applicable, fill out or request a second copy of the PFS if you are separated, divorced or have a financially responsible parent/guardian in another household. This must be filled out and sent in by the second parent • If you own a business or farm, request <i>The Business/Farm Statement</i>
Postmarked by Thursday, February 1, 2008	Parents	<p>Submit <i>Parents' Financial Statement (PFS)</i> and required fee online or to: ETS PFS Box 371478, Pittsburgh, PA 15250-7478</p> <p>Note: Use estimates of income if necessary; be sure to explain all circled items; be sure to fill in an amount for Question #25 A and B.</p>
By Friday, February 22, 2008	Parents	<p>Submit directly to Miriam Phillips, Business Manager at The San Francisco School, 300 Gaven Street, SF, CA 94134</p> <ul style="list-style-type: none"> • Photocopy of PFS sent to SSS • Application for Indexed Tuition • Signed copy of 2007 IRS Form 1040, 1040A or 1040EZ with W-2s and all schedules and attachments • Signed IRS Form 4506 with lines 1-4 completed <p>If applicable, also submit a second <i>Parent Financial Statement (PFS)</i> – there is no longer a different form –and/or <i>The Business/Farm Statement</i>.</p>
By February 25, 2008	SFS	Indexed Tuition award letters mailed to all returning families.
On and after February 28, 2008 (3 & 4 year old applicants) On and after March 12, 2008 (K-8 applicants)	SFS	Rolling Indexed Tuition decisions made simultaneously with admission decisions.