We recognize that applying for financial aid can be an involved and complex process, one that, in the interest of fair decision-making, asks families to share information that would typically remain private. We sympathize and want to do all we can to reduce the stress of the situation and to develop as clear an understanding as possible of your family’s specific circumstances and needs.

With this in mind, we provide the following calendar of required application elements to help keep you on top of the process. If you have any questions about any of the highlighted application components, please feel free to call Kimberly Cummings, our Financial Aid Coordinator at (914) 366 2673 or Karen Beatty, our Financial Aid Director at (914) 366 2657 or to email us at fa@hackleyschool.org.

**Beginning August 30 – Friday**
Families new to the financial aid process at Hackley should contact Kimberly Cummings in the Hackley Admissions Office to confirm interest in applying for financial aid for the 2020-2021 school year.

Once you’ve submitted the family portion of your application to Hackley, if you think there is even a slight chance that you will be applying for financial aid, we recommend that you contact Kimberly Cummings. Knowing of your potential interest will enable us to budget better for your potential need and will increase the likelihood of funds being available for you should your child be admitted to Hackley. Kimberly may be reached by phone or email.

**October 2 – Wednesday**
**PARENT FINANCIAL STATEMENT (PFS) becomes available.**

Hackley’s financial aid program employs the School & Student Services (SSS) for Financial Aid. Each year, parents complete an online financial application, the Parent Financial Statement (PFS); this information is then put through an objective need-analysis process by SSS, and the results are sent to Hackley. This analysis, combined with other information families provide, is used by our confidential Financial Aid Committee to make award decisions.

The PFS is available at [http://sssbynais.org/parents](http://sssbynais.org/parents); Hackley applicants must complete the form online and submit it to SSS no later than December 31, 2019.

Please note: if an applicant’s parents reside in different households, both parents must complete and submit separate Parent Financial Statements. Please provide the most thorough and detailed information you can on your PFS in order to avoid delays in reviewing your application.

The PFS costs $51 to complete. Fee waivers for the PFS application will be given automatically, when submitting the PFS, if you meet the income-based qualifications.

**December 31 – Tuesday**
**PARENT FINANCIAL STATEMENT (PFS) must be completed and submitted by today**
(see details at Oct 2)
2018 TAX RETURNS must be submitted by today

ALL tax documentation must be uploaded to the SSS system. This helps streamline the process for Hackley while reducing paper and further protecting your privacy. Please refer to the instructions found on the attached document “How to Apply for Financial Aid”.

**Tax returns**, including all federal and state forms and schedules, must be signed, dated and uploaded to SSS no later than today. If parents file separately, tax returns from both parents are required. If you do not have a scanner you may send your documents directly to SSS and they will scan them for you. The address can be found on SSS’s website. You must include the cover sheet found in your portal.

If the **tax returns** are incomplete the file cannot be reviewed and no decision can be made for any potential award. If an applicant’s parents live in separate households, tax returns for each household must be uploaded to SSS.

Parents new to Hackley’s financial aid program who are partners in a business or who own corporations must upload the last two years (2017 and 2018) of **business** tax returns to SSS, along with all schedules and attachments. In addition, you must upload the last two years of your **personal** tax returns (2017 and 2018 federal and state), including all attachments and schedules, to SSS. Families continuing in the program need only upload the most recent returns.

Similarly, parents new to the program whose individual tax return includes a Schedule C (and who are thus classified as sole proprietorships) will need to upload to SSS the last two years of individual returns (2017 and 2018 federal and state), including all attachments and schedules. Families already receiving aid need only upload the most recent returns.

February 7 – Friday
2019 W-2s AND/OR 1099s must be submitted by today

April 15 - Wednesday
2019 TAX RETURNS must be submitted by this date

**Tax returns**, including all federal and state forms and schedules, must be signed, dated and uploaded to SSS no later than today. If you are a partner in a business or own a corporation please upload to SSS the business tax returns as well. If you filed an extension please let Kimberly Cummings know and we will add a spot in your SSS account for you to upload the extension.

We realize that the process and documentation outlined above may not always provide the full context of an applicant family’s full financial condition. The Financial Aid Committee firmly believes that having the most accurate assessment possible of a family’s financial situation is critical to ensuring that the awards we make provide the best possible support for students here at Hackley. To that end, the Committee reserves the right to request additional information to support any part of your financial aid application that will help further this goal. These supporting documents may include personal narratives, letters of support or attestation from those who know your family, or IRS form 4506 which recalls certified copies of tax documents from the IRS directly. Should the Committee make such a request in support of your application, we ask that you respond in a timely manner with the requested materials. Applications which do not have requested materials cannot be considered for review and adjudication of awards.