



PLEASE READ THE INSTRUCTIONS IN ITS ENTIRETY

The financial assistance (FA) process is strictly confidential. By submitting your financial assistance packet, you agree to the terms and conditions of the financial assistance policies and procedures. Financial need is determined by the ability to meet educational expenses, not on a willingness to pay. Awards are annual, contingent upon continuing eligibility and availability of funds.

Financial Assistance (FA) documents will not be accepted or processed until the Enrollment & Tuition Agreement has been signed and all monies due to Posnack are paid and up to date.

DEADLINE:

For existing Posnack School families, the FA application is due no later than January 31, 2022.

For new families, the FA application is due one week from the date the signed Enrollment and Tuition Agreement is submitted.

All financial assistance applications submitted after the deadline will be reviewed on a first-come, first-serve basis. Adhering to the deadline and responding to missing information is critical.

THE FINANCIAL ASSISTANCE PROCESS:

FA LINK: The financial assistance application is completely online. Please use the following link to complete the application: <https://form.jotform.com/211034845872153>

1. Please complete the application in full. Do not leave any question unanswered.
2. If the question does not pertain to your situation, write "N/A" in the space provided.
3. All documents on the CHECKLIST need to be uploaded in the specified section before submitting the application.
 - Once the application is submitted, any missing items will not be able to be uploaded to your current file.
 - If items are missing after the application is submitted and then emailed at a later date, the process of reviewing your application will be slowed considerably.
 - For Example:
If your bank statement includes a debit to a credit card company, make sure the credit card listed on the bank statement is included with the statements you upload in the credit card section.
4. EXCEPTIONS to submitting items by the deadline:
 - 2021 Tax Returns are due when completed but no later than April 16, 2022.
 - 2021 Tax related items such as 2021 W-2's or 1099's are due February 2022, if not included in the originally submitted application.
 - **DO NOT wait for the above items before submitting the application. Adhere to the January 31, 2022 deadline.**
5. Upload form 4506. Only parent signatures are required on that form.
6. The non-refundable application fee is \$50 if your paperwork is received by the deadline. After the deadline the fee will increase to \$100.
7. Please use the following Paypal link to pay the FA application fee:

PayPal Link:

https://www.paypal.com/cgi-bin/webscr?cmd=s-xclick&hosted_button_id=VZTGNHFAS86GE

8. In addition to Posnack School's financial assistance, all families are required to apply to Step Up for Students for their income-based scholarship.
Link: www.Stepupforstudents.org.

DO NOT wait to hear if you are awarded Step Up for Students before applying for Posnack School's financial assistance.

Upload documentation that you have submitted your application to Step Up for Students with your Posnack School Online financial assistance application.

9. Once your financial assistance is received, you will be notified of any items needing clarification. You will have one week to submit the requested items. If the items are not received by the given date, your financial assistance will NOT be reviewed, and your Enrollment & Tuition Agreement will be considered a FULL pay agreement.
10. Both parents' information that sign the Enrollment and Tuition Agreement must be included on the Application. If parents are not married, 2 separate Financial Assistance Applications are required.
11. Financial assistance is not guaranteed.

FA COMMITTEE'S DECISION:

- If financial assistance is awarded, parents will receive a revised Enrollment and Tuition Agreement through DocuSign. Both parents (if applicable) are required to sign within one week of the revision being sent or the financial assistance will be forfeited.
- If financial assistance is **not** awarded, parents will receive an Enrollment and Tuition Agreement through DocuSign. Parents will have one week to send the Business Office a written statement (1) if the student(s) will not attend the 2022-2023 school year or (2) appeal the decision. If the Business Office does not receive written notification by the deadline the agreement will be FULL PAY.

If ANY scholarship and/or grant is awarded after the family accepts the financial assistance, the committee may adjust the amount of the award.

The process of applying for and receiving financial assistance is kept strictly confidential. It is our intent to make this assistance available as broadly and fairly as possible. **WE DO NOT SHARE THIS INFORMATION WITH ANY GOVERNMENTAL AGENCY.** Information provided will be held confidential and is for Financial Assistance purposes only.

You will lose all financial assistance, and reimbursement of full payment will be required, if it is disclosed that you discussed ANY part of the financial assistance process including but not limited to the amount, terms or general information of your financial assistance with anyone but the Financial Assistance Department.

For questions please contact:

Donna Diehl (East Campus) at 954-299-3600 ext. 406, ddiehl@posnackschool.org

Karen Kleiman (Main Campus) at 571-561-7475, kkleiman@posnackschool.org

Copy of completed 2019, 2020, and 2021 Personal Federal Income Tax return

2020 Tax return due by April 19, 2022. All other tax returns due with FA application.

Do not Submitted Tax Returns that you submitted last year.

Print, sign and upload IRS Form 4506.

IF YOU OWN YOUR OWN COMPANY: copy of your completed 2019, 2020, 2021

Corporate Federal Income Tax return and K-1.

IF YOU OWN YOUR OWN COMPANY: Copy of your completed Profit & Loss

Statements for 2021.

Copy of all W-2 forms received by you for income earned in 2021.

Copy of all 2021 - 1099 forms received by you for all income including interest, dividends and rentals received and for any interest paid by you for mortgage, etc.

Copy of ALL applicants pay stubs for END of MONTH for the past 2 months.

Copy of your year-end 2021 mortgage statement for ALL PROPERTIES YOU OWN, including your primary residence, secondary residence, time share or business property.

Copy of ALL leases for ALL properties you rent, including your primary residence and business residence.

If DIVORCED or SEPARATED, a copy of your signed/recorded divorce decree and a complete copy of any property/marital settlements entered into between you and the child/s other parent including any pending litigation regarding child support, support enforcement or child custody.

ONLY SUBMIT IF YOU HAVEN'T HANDED IN BEFORE.

Copy of driver's licenses of ALL responsible parties.

Copy of auto insurance CARD listing ALL cars.

Copy of your last three (3) months of ALL bank statements.

INCLUDE EXPLANATION FOR ALL DEPOSITS.

Copy of your last three (3) months of ALL credit card statements.

(not just page 1 of the bill) Do not submit blank or advertisement pages.

Copy of summer camp price list.

\$50.00 application fee (After deadline: \$100)

Use PayPal link:

https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=VZTGNHFAS86GE

Apply to Step Up For Students. Provide documentation that you applied.

Stepupforstudents.org

Request for Copy of Tax Return

(Rev. January 2011)

OMB No. 1545-0429

Department of the Treasury
Internal Revenue Service

▶ Request may be rejected if the form is incomplete or illegible.

Tip. You may be able to get your tax return or return information from other sources. If you had your tax return completed by a paid preparer, they should be able to provide you a copy of the return. The IRS can provide a **Tax Return Transcript** for many returns free of charge. The transcript provides most of the line entries from the original tax return and usually contains the information that a third party (such as a mortgage company) requires. See **Form 4506-T, Request for Transcript of Tax Return**, or you can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Order a Transcript" or call 1-800-908-9946.

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number or individual taxpayer identification number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (See instructions)	
4 Previous address shown on the last return filed if different from line 3 (See instructions)	
5 If the tax return is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax return.	

Caution. If the tax return is being mailed to a third party, ensure that you have filled in line 6 and line 7 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy.

6 **Tax return requested.** Form 1040, 1120, 941, etc. and all attachments as originally submitted to the IRS, including Form(s) W-2, schedules, or amended returns. Copies of Forms 1040, 1040A, and 1040EZ are generally available for 7 years from filing before they are destroyed by law. Other returns may be available for a longer period of time. Enter only one return number. If you need more than one type of return, you must complete another Form 4506. ▶ _____
Note. If the copies must be certified for court or administrative proceedings, check here

7 **Year or period requested.** Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than eight years or periods, you must attach another Form 4506.

8 Fee. There is a \$57 fee for each return requested. Full payment must be included with your request or it will be rejected. Make your check or money order payable to "United States Treasury." Enter your SSN or EIN and "Form 4506 request" on your check or money order.		
a Cost for each return	\$ 57.00	
b Number of returns requested on line 7		
c Total cost. Multiply line 8a by line 8b	\$	

9 If we cannot find the tax return, we will refund the fee. If the refund should go to the third party listed on line 5, check here
Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax return requested. If the request applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506 on behalf of the taxpayer. **Note.** For tax returns being sent to a third party, this form must be received within 120 days of signature date.

▶ Signature (see instructions)	Date	Telephone number of taxpayer on line 1a or 2a
	▶ Title (if line 1a above is a corporation, partnership, estate, or trust)	
▶ Spouse's signature	Date	