Financial Aid Checklist

Application & Supporting Materials Deadline

- Please ensure that the Parent Financial Statement (PFS) and <u>all required</u> documents and supporting materials are <u>submitted</u> by the following dates: (*An incomplete file will not be reviewed.*)
- Returning Families to SC: December 1, 2023
- New Applicant Families: January 12, 2024

STEP 1: Complete and Submit the Online Admission Application for Sierra Canyon Applicant Families

• Indicate that you are applying for financial aid on the Sierra Canyon online admission application (new families only).

STEP 2: Complete and Submit the Parents' Financial Statement

- Starting on September 1, 2023, visit the School and Student Services (SSS) website https://sssandtadsfa.my.site.com/schoolportal/ and begin your financial aid application (PFS).
- Complete a Parents' Financial Statement (PFS) using your family's estimated 2023 and completed 2022 financial information. The PFS needs to be as accurate an estimate of your income and current assets.
- If necessary, include information about extenuating circumstances regarding your finances in the Other Considerations section of the PFS.
- List Sierra Canyon as a school that should receive a copy of the results (SC code is 4093).
- Pay the \$60 application fee and submit the PFS. Fee waivers are automatically issued to families who meet SSS
 income requirements.

STEP 3: Upload <u>Required</u> Tax Documents and Supporting Materials

- Upload the following required tax documents directly to the SSS website on the "My Documents" page. <u>All documents</u> <u>must be non-password protected</u>.
 - o 2022 Complete Federal Tax Return including all Schedules
 - o 2022 W-2 and/or Form 1099
 - Business Owners with an S-Corp and/or Partnership listed on a Schedule E must upload the corresponding K-1s and Forms 1065 and/or 1120S
 - o Current Bank Statements including savings account (2 months as single PDF)
 - o Current Pay stub for each parent
 - o Any child support, custody arrangement, spousal support agreement that indicate educational expenses
 - o A signed 4506 IRS form
 - A written explanation of any unusual circumstances that have affected your family's financial situation this year that you would like Sierra Canyon to consider (upload in additional document section)

• For new applicant families, we will need complete 2022 tax return and a 2023 W-2 for both parents uploaded by February 1.

Other inquiries regarding financial aid can be directed to Kendall Pillsbury, Director of Financial Aid, at (818) 882-8121, ext.1142 or at kpillsbury@sierracanyonschool.org.