# 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 **submitted** by the following dates: (An incomplete file will not be reviewed.)

Returning Families to SC: December 6, 2024
New Applicant Families: January 10, 2025

## 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, 2024, visit the School and Student Services (SSS) website <a href="https://sssandtadsfa.my.site.com/schoolportal/">https://sssandtadsfa.my.site.com/schoolportal/</a> and begin your financial aid application (PFS).
- Complete a Parents' Financial Statement (PFS) using your family's estimated 2024 and completed 2023 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 Required 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> must be non-password protected.
  - o 2023 Complete Federal Tax Return including all Schedules
  - o 2023 W-2 and/or Form 1099
  - o 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 Birth Certificate of Student
  - 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
  - o 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 2023 tax return and a 2024 W-2 for both parents uploaded by February 1, 2025.

Other inquiries regarding financial aid can be directed to the Office of Financial Aid at (818) 882-8121, ext.1142 or at fa@sierracanyonschool.org.