

WELLAN: APPLYING FOR FINANCIAL AID FOR THE 2024-25 ACADEMIC YEAR

Wellan Montessori School partners with School and Student Services (SSS) by NAIS in our financial aid process. To begin your financial aid application, you will complete SSS's Parents' Financial Statement (PFS). For more information regarding the process, visit ssbynais.org/parents.

We will communicate our financial aid decision to you. To make our decision, we use the information from the PFS as a starting point but also consider our school policy, practices, and available budget.



HOW TO COMPLETE THE PARENTS' FINANCIAL STATEMENT (PFS) ONLINE

- Beginning NOW, go to <https://sssandtadsfa.force.com/familyportal/>
- Create your PFS Online account with your email address and a password. If you applied for financial aid last year, simply login to the PFS Online as a Returning Family.
- Begin a PFS for Academic Year 2024-25. You can log out of the PFS Online at any time, then return later to complete it.
- After you click "submit," you'll see a payment screen. The fee of \$55 is nonrefundable. Once your PFS is submitted, it cannot be withdrawn from the SSS system.
- After you pay for and submit your PFS, you'll have access in the PFS Online to a section called "My Documents." You can upload the additional documents we require there.



HOW TO SUBMIT ADDITIONAL REQUIRED DOCUMENTS ONLINE

- Prepare your documents to be uploaded. Make sure the documents are on your computer, each saved as a separate file. Remove any security or password protection from your document files.
- Return to the PFS Online and login.
- Select the Academic Year 2024-25 button.
- From the PFS Online, click on the "My Documents" tab.
- On the "My Documents" page, click the upload button next to a specific document name in the "Required Documents" section of the PFS. Then name, locate and save the file.
- Once you have uploaded a document, the date will appear in the "Date Uploaded" column within minutes. The document verification can take up to 48 hours to complete.

If you wish to submit required documents by mail, send to School and Student Services, PO Box 449, Randolph, MA 02368-0449 (do not mail documents to Wellan). For overnight service, use: SSS by NAIS, Application Processing Center, 15 Dan Road, Suite 102, Canton, MA 02021. **If you need help completing the PFS, contact SSS customer service at (800) 344-8328.**

WELLAN MONTESSORI SCHOOL – KEY FINANCIAL AID FACTS:

- SSS code: 4587
- **CURRENT FAMILIES: 12/15/23** is the due date for completing the PFS, submitting **2022** tax documents, and for submitting additional documents (see below). Your **2022** tax documents will be used to determine a tentative financial aid award, to be confirmed upon receipt of your **2023** tax documents (submitted directly to SSS) before **2/15/24**.
- **FAMILIES APPLYING TO WELLAN FOR THE FIRST TIME: 1/15/24** is the due date for completing the PFS, submitting **2022** tax documents, and for submitting additional documents (see below). You must also submit your **2023** tax documents before **2/15/24**.
- Additional tax-related documents we require you to submit to SSS, in addition to the PFS:
___ 2022 1040, 1040A or 1040EZ ___ 2023 1040, 1040A or 1040EZ ___ 2022 W2 Form(s) ___ 2023 W2 Form(s)
___ Schedule C if applicable ___ 1099 Form if applicable ___ Form 4506 (request for copy of tax return)

Questions? Please call SSS first; If you need to contact Wellan regarding financial aid: Joe Jolly at 617-916-5923