



Church of St Gregory the Great

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Financial Assistance Program Diocese of Trenton/St. Gregory the Great Parish 2018-2019 School Year

“Over 80% of Academy families who applied for financial assistance received an award for the 2017-2018 school year.”

The Diocese of Trenton has retained FACTS Management to assist in the administration of a financial assistance program for families with children in **Grades K-12** in diocesan elementary schools. FACTS uses its expertise to provide an objective and uniform evaluation of each family’s specific situation. This evaluation results in a realistic ranking based on a family’s ability to pay for Catholic education. Eligible families can receive a maximum grant of up to one half of the “Category A” tuition rate from the diocesan program. Funds will be distributed based on the determined financial need of the family.

St. Gregory the Great Parish will be working in conjunction with FACTS for the 2018-2019 school year in order to award parish-based financial aid. **The Church of St. Gregory the Great will make approximately \$60,000.00 of financial assistance available to families who qualify. Families who are anticipating that they will have trouble meeting the cost of tuition are urged to complete the FACTS application. We are committed to assisting families who are challenged to meet the cost of tuition. Over 80% of Academy families who applied for financial assistance received an award for the 2017-2018 school year.**

“We are committed to assisting any family who desires a Catholic education that is authentically Catholic and academically excellent in affording that education at St. Gregory the Great Academy.”

Families will complete one FACTS application which will determine eligibility for both diocesan and parish financial assistance. In order to apply for financial assistance, a family must complete the FACTS application. The application is available by following this link: online.factsmgt.com/aid. Families completing the online application must also forward supporting documentation as outlined in the instructions. There is a \$30.00 application fee per family.

THE ELECTRONIC APPLICATION IS NOW AVAILABLE. Applications must be submitted online by **MARCH 2, 2018** to be considered in Round 1, and by **MAY 18, 2018** to be considered for Round 2. ALL ACADEMY FAMILIES SHOULD SUBMIT THEIR APPLICATION FOR ROUND 1 SO THAT THERE IS THE MAXIMUM CHANCE OF RECEIVING AN AWARD. THERE IS MORE FUNDING AVAILABLE IN ROUND 1 COMPARED TO ROUND 2, SO DO NOT DELAY.

“No family who desires Catholic education for their child will be turned away without assistance.”

Please note that filing the application with FACTS is the ONLY manner in which financial aid can be requested from both the Diocese of Trenton and St. Gregory the Great Parish. No parish aid will be awarded without a complete application to FACTS. Also please remember that it is necessary to reapply for financial assistance each year; **awards do not automatically renew.**

If your family has a unique situation that you would like to discuss in more detail, please contact Dr. Jason C. Briggs, Principal, at jbriggs@stgregorythegreat.org. We will make every possible effort to assist you in affording a Catholic education at St. Gregory the Great Academy. If you have any difficulty completing this process, or have any questions, please feel free to contact Dr. Briggs as soon as possible. All inquiries are kept strictly confidential.



Grant & Aid Assessment

FACTS Management makes quality education affordable for families by assisting schools in awarding financial aid. We work with schools to create a custom application and collect financial data so schools can make accurate award decisions based on financial need.

After completing the online application, you will need to upload or fax all required supporting documentation. Uploaded documents must be in PDF format and the size of each document must be less than 20 MB. If you are unable to upload, fax the required documents to 866.315.9264. Please **DO NOT** use your mobile device to photo copy required documents due to problems with legibility.

The following supporting documents are required to complete the application process:

- Copy of the most recent **IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return** (the year of the tax return depends on the tax requirements of the school). If applicant and co-applicant file separately, we require both tax returns for the same tax year. We do not require State Tax Returns.
- Copies of **all the current year W-2 Wage and Tax Statements** for both the applicant and co-applicant. **NOTE:** If you are applying before you have received all the current year W-2 Wage and Tax Statements, please submit them as soon as they become available.
- Copies of all supporting tax documents if you have business income/loss from any of the following:
 - Business** - send Schedule C or C-EZ and Form 4562 Depreciation and Amortization
 - Farm** - send Schedule F and Form 4562 Depreciation and Amortization
 - Rental Property** - send Schedule E (page 1)
 - S-Corporation** - send Schedule E (page 2), Form 1120S (5 pages), Schedule K-1 and Form 8825
 - Partnership** - send Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
 - Estates and Trusts** - send Schedule E (page 2), Form 1041 and Schedule K-1

***IMPORTANT: If you file a tax return but do not have W-2 wages because you are self-employed, you will be required to submit a copy of your current year Federal Form 1040 Tax Return.**

- Copies of all supporting documentation for **household Non-Taxable Income** such as: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF). If you do not file a tax return, you are required to provide documentation of all income received.

*All documentation received is imaged upon receipt and then destroyed.

You may login to your FACTS user account to review the status of your application. **Please allow 2 weeks processing time from the date you provided the supporting documents before inquiring further about receipt and/or status of the uploaded or faxed documents.** Application deadlines are set by the institution awarding the scholarships. If you are applying after the deadline, please contact your school to ensure that your application will be accepted.

*A non-refundable application fee may be required before your application will be submitted.

NOTE: Award decisions are made by the institution providing the scholarship, not FACTS.

For more information, visit FACTSmgt.com/grant-and-aid





Evaluación de Donación y Asistencia

FACTS Management hace la calidad de educación asequible para familias por medio de asistir a las escuelas con la asignación de ayuda financiera. Trabajamos con las escuelas para crear una solicitud personalizada y coleccionar datos financieros para que las escuelas puedan tomar decisiones precisas basadas en la necesidad económica.

Para solicitar ayuda financiera, visite online.factsmgmt.com/aid.

Al completar su solicitud en línea, usted necesitara subir o enviar por fax los documentos requeridos. Los documentos que suba en línea tienen que estar en el formato PDF y el tamaño de cada documento tiene que ser menos de 20 MB. Si no puede subir los documentos requeridos, envíelos por fax al 866.315.9264. Por favor **NO** use su móvil para tomar copia de los documentos requeridos por problemas de legibilidad.

Se requieren los siguientes documentos para completar el proceso de solicitud:

- Copia de la **Forma Federal 1040, 1040A o 1040-EZ U.S. Individual Income Tax Return** del año más reciente (el año de la declaración de impuestos depende de los requisitos de la escuela). Si el solicitante y el co-solicitante declaran por separados, requerimos ambas declaraciones de impuestos para el mismo año. Los impuestos del Estado no son requeridos.
- Copias de **todas las últimas W-2 Wage and Tax Statements**, para el solicitante y el co solicitante.
NOTA: Si está solicitando antes de recibir todas las formas W-2 Wage and Tax Statements del año 2016, por favor somételas tan pronto sean disponibles.
- Copias de los formularios respaldantes si tiene ingresos de:
Negocio - Incluya el Formulario C o C-EZ y la Forma 4562 Depreciación y Amortización
Hacienda - Incluya el Formulario F y la Forma 4562 Depreciación y Amortización
Propiedad Rentable - Incluya el Formulario E (Página 1)
Sociedad Anónima Pequeña (S) - Incluya el Formulario E (Página 2), la Forma 1120S (5 páginas), el Formulario K-1 y la Forma 8825
Sociedad Colectiva (o de Personas) - Incluya el Formulario E (Página 2), la Forma 1065 (5 páginas), el Formulario K-1 y la Forma 8825
Caudales Hereditarios y Fideicomisos - Incluya el Formulario E (Página 2), la Forma 1041 y el Formulario K-1

***IMPORTANTE: Si usted declara impuestos pero sus ingresos no son reportados en una Forma W-2 porque trabaja por su cuenta, se requiere someter la copia del año más reciente de su declaración de impuestos federales.**

- Copias de toda documentación respaldante para **ingresos no sujetos a impuestos** como el Seguro Social, Asistencia Pública, Sostén de Menores, Estampillas de Alimento, Compensación al Trabajador, y Asistencia Temporal para Familias en Necesidad (TANF) recibidos en el hogar. Si usted no declara impuestos, se requiere documentación de ingresos no sujetos a impuestos.

*Toda la documentación enviada por un solicitante se digitaliza apenas se recibe y luego se destruye por razones de seguridad.

Usted puede entrar en su cuenta de FACTS para verificar el estado de su solicitud. **Por favor permita dos semanas para el proceso de la solicitud antes de preguntar sobre la recepción y/o el estado de los documentos que subió en línea o por fax.** La fecha límite de la solicitud es establecida por la escuela o institución donando las becas. Si usted está solicitando después de la fecha límite establecida, por favor comuníquese con su escuela o institución para asegurar que su solicitud será aceptada.

*Pago de la cuota no-reembolsable puede ser requerido antes de su solicitud ser sometida.

NOTA: Las decisiones sobre las donaciones otorgadas no son tomadas por FACTS, si no por la organización proveyendo la beca.

Para más información, visite FACTSmgt.com/grant-and-aid.



Instructions for FACTS Grant & Aid Application

► Steps to create a Grant & Aid Application with FACTS

- Go to the link on your school's webpage and click on Create a FACTS Account if you are new to FACTS. If you have a current FACTS account, please sign in with your user name and password. Follow the prompts and when completed select Apply for Financial Aid (bottom right)

OR

- If your school does not have a link, go to *online.factsmgmt.com* and click on Register (left side of page)
- Select Search for my Institution – enter zip code, click on your school's name
- On right side of page under New Account click Create Username & Password
- Once completed you will be on your Home Page – select Apply for Financial Aid (bottom right)

► Navigating the Application

- Complete all items marked with a RED Asterisk * - these are required items and you will not be able to proceed without supply this information
- Use the margin on the left to return to previous screens or the **Previous** button on the bottom of the page. Do not use the browser arrows.

If needed you can Save & Exit and then return to complete the application

► Submitting the application

- Review your application to make sure all information is correct
- Click Submit
- If you are faxing or mailing your documents click Print Cover Page
- Sign Out (top right corner)

► Sending the proper documents

- Application is not complete and scholarships/aid cannot be awarded until all documents are received by FACTS
- At bottom of cover page you will find fax number or mailing address

Include cover page when faxing or mailing your documents (if mailing do not send original tax documents, send a copy and keep originals for your files)