

**DIOCESAN EDUCATION ENDOWMENT TRUST
TUITION ASSISTANCE FUND
SCHOOL YEAR 2017-2018**

MAKING THE CATHOLIC SCHOOL EXPERIENCE POSSIBLE

The Charles and Elaine Sammons Tuition Assistance Fund, of the Dallas Diocesan Education Endowment Trust, is established for the purpose of providing tuition assistance to parents who desire to educate their children in a Catholic elementary and/or secondary school owned and operated by the Diocese of Dallas or one its parishes. Financial aid is available to eligible students accepted for admission and enrolled at one of these schools whose families can demonstrate the need for financial assistance in order to afford a Catholic school education. The funds are limited, therefore the following process will be used to best utilize the limited resources.

ELIGIBILITY

To be eligible for tuition assistance, a family/student must:

- Demonstrate financial need;
- Meet the entrance requirements of the specific parochial/diocesan school;
- Be accepted for admission to grades K–12 and enrolled in that school; and
- Be current with all financial obligations due to any Catholic school within the diocese.

Secondary criteria for eligibility that may be considered include:

- The child's regular attendance;
- The likelihood of the child's long-term enrollment;
- The participation of the parents in school activities as expected of all parents;
- The family's payment history; and
- The student's maintenance of an academic level consistent with school standards and individual abilities.

Financial aid is awarded without regard for race, religion, gender, or ethnic origin.

RENEWAL

Financial aid awards are made on an annual basis only, and families must re-apply every year in which tuition assistance is desired.

HOW TO APPLY

Submit an online application through FACTS Grant and Aid Assessment. Contact the Catholic Schools Office or an eligible parochial or diocesan school for assistance, if needed, in completing this application online. Applicants can also contact FACTS for assistance with the application by calling 1-866-315-9262.

Please note the following dates, deadlines, and important information:

- January 1, 2017 through March 31, 2017: Students register for the 2017-2018 school term at all Catholic schools.
- On or before April 1, 2017, families with students in grades K–12 who have been accepted for admission to a specific diocesan/parochial Catholic school may apply for tuition assistance by submitting an online application through the FACTS Grant and Aid Assessment website at <https://online.factsmgt.com>.
- Financial documents required to be submitted with the application include a completed 2016 Federal Form 1040 Income Tax Return (2 pages) including all tax schedules, and all 2016 W-2 and 1099 forms. **See attached Checklist of required tax documents.** Incomplete applications will not be considered.
- All financial information submitted by the family is strictly confidential.
- When a single parent applies for financial aid, he or she must supply the school with the name and current address of the non-custodial parent. This requirement is waived only when information is supplied to the school indicating that the other parent is deceased or the whereabouts of that parent is unknown.
- A family with more than one child submits only one application for any or all of the children attending a tuition paying school.
- No financial assistance awards will be made for more than 50% of the total tuition.
- Families of financial aid recipients are expected to pay for non tuition expenses incurred while the child attends school, including all fees, before and after school programs, transportation, and food expenses.
- FACTS Grant and Aid Assessment will provide the Catholic Schools Office with the recommended maximum amount of assistance for which the family qualifies. The amount of tuition assistance to be awarded will be limited to the dollar amount available for distribution.
- Financial aid awards are non-transferrable and non-refundable and will be paid on behalf of the student/family directly to the school or schools specified for each student in the application.
- Tuition award checks will be dispersed to the schools in September after verification that the students awarded grants are in fact enrolled in the school.

NOTIFICATION

Decisions regarding financial assistance awarded from the Diocesan Tuition Assistance Funds will be mailed beginning May 11, 2017. If a parent/guardian does not receive a notification letter, contact your local Catholic school office to check the status of the application.

FACTS Grant & Aid Checklist

Don't forget to send the following:

- Payment of the nonrefundable application fee. (If payment was submitted online, please disregard).
- Signature required for paper applications only. Paper applications received without a signature will not be processed.
- Copy of 2016 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. **If applicant and co-applicant file separately, we require both tax returns for the same tax year.**
- Copies of all 2016 W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the 2016 W-2 Wage and Tax Statements, please submit them as soon as they become available.
- Copies of all supporting tax schedules if you have income from any of the following*:
 - Business – (Form 1040 Line 12) Attach Schedule C or C-EZ and Form 4562 Depreciation and Amortization
 - Farm – (Form 1040 Line 18) Attach Schedule F and Form 4562 Depreciation and Amortization
 - Rental Property – (Form 1040 Line 17) Attach Schedule E (page 1)
 - S-Corporation – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1120S (4 pages), Schedule K-1 and Form 8825
 - Partnership – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
 - Estates and Trusts – (Form 1040 Line 17) Attach 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 2016 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).

Please allow 2 to 4 weeks for your application and supporting tax documents to be processed. We are unable to verify receipt of documents until they are scanned into our system, which takes approximately 2 to 3 business days. Faxed applications will not be accepted. Application deadlines are set by the school or institution awarding the scholarships. If you are applying after a given deadline date, please contact your school or institution to ensure that your application will be accepted. It is recommended that you keep a copy of your application for your records.

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