



# Welcome to Saint James School

6010 Vaughn Road  
Montgomery, Alabama 36116  
334.273.2992  
Admissions@STJweb.org  
STJweb.org

---

Saint James School is an independent, nonsectarian, college preparatory school with a student body broadly representative of college-bound students. We are committed to challenging and assisting students in realizing their individual potential and preparing them for lives of responsibility, service, and achievement.

---

Academic support for English Language Learners is available. Saint James School admits students of any religion, race, color, gender, creed, national, and ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the school.

## Financial Assistance

Financial assistance is available for students in Pre-K3-12th grades. Financial assistance applies to tuition only. It does not cover the costs for enrollment fees, books, uniforms, after school programs, or other school-related expenses. All students who receive financial assistance must maintain a 73 average or higher in core academic subjects with no failing grades.

The financial assistance process at Saint James School requires several steps. In order to ensure you receive full consideration, please complete this process as soon as possible. The paperwork deadline for early decision notification is February 13, 2020 for Pre-K3,-Pre-K4 and Kindergarten applicants. The deadline for the early decision is February 20, 2020 for 1st-12th grade applicants.

To be considered for financial assistance, you must complete an application for each school year. If your child is a new student, he or she must have been accepted for enrollment to Saint James School before the financial assistance process starts.

If a child's parents are divorced, both custodial and non-custodial parents (if a parent or both parents are remarried) must submit *all* financial assistance documents. There will be no exceptions to this requirement, which is mandated by the National Association of Independent Schools (NAIS) financial assistance principles. Please note that information received from one parent is never shared with the other parent.

Saint James School utilizes the services of the School and Student Services (SSS), an organization utilized to obtain financial assistance recommendations. The SSS organization does not award financial assistance. SSS assists NAIS member schools throughout the nation in making recommendations as to the amount of money a family can contribute toward a child's education.

Saint James School makes the decision about the amount of financial assistance awarded based on the SSS recommendation, the criteria for financial assistance as established by Saint James School's Board of Trustees, the approved budget for financial assistance, and the family's financial need.

# Financial Assistance Application Procedure

**SSS Requirements:** A Parent's Financial Statement (PFS) must be filed on-line at [sssbynais.org/parents](http://sssbynais.org/parents) (see attached instructions). If you need help completing the PFS, contact the SSS HELPLINE number at 1-800-344-8328 or email [sss@nais.org](mailto:sss@nais.org). A PFS is required from both custodial and non-custodial parents.

**School Requirements:** All financial assistance applicants must also complete the attached Application for Financial Assistance. Following the direction of the FAFSA for College Financial Assistance, we are using the prior, prior year tax returns along with the 2019 W-2s and 1099s. This alleviates any difficulty in not having 2019 tax returns filed by April 15, 2020. We will not process your application without copies of your 2018 tax return and current year (2019) W-2s and 1099s. An application and tax forms are required from both custodial and non-custodial parents.

FOR FAMILIES NEW TO SAINT JAMES SCHOOL, ALL TAX DOCUMENTS AND FINANCIAL ASSISTANCE APPLICATIONS ARE DUE TO THE BUSINESS OFFICE BY FEBRUARY 13 (PRE-K3-KINDERGARTEN) OR FEBRUARY 20 (GRADES 1-12) FOR PRIORITY CONSIDERATION.

Applications can be hand delivered to the business office or mailed to:

Saint James School  
Financial Assistance  
6010 Vaughn Road  
Montgomery, Alabama 36116-1202

The Office of Admissions serves as the liason between the business office and our new families. All financial assistance applications are processed by the Saint James School Business Office. Financial Assistance decisions will be mailed with Admissions Acceptance Letters. If you have any questions, please feel free to contact our Associate Dean of Admissions, Kate Bartlett, at 334-273-3021.

Sincerely,



Cathy Pearson  
Dean of Admissions  
Saint James School

**SAINT JAMES SCHOOL  
FINANCIAL ASSISTANCE APPLICATION  
2020-2021 ACADEMIC YEAR**

The information on this application is provided for the use of Saint James School only.

FOR EARLY ADMISSIONS DECISION NOTIFICATION OF NEW FAMILIES, THE COMPLETE FINANCIAL ASSISTANCE APPLICATION IS DUE TO THE BUSINESS OFFICE FEBRUARY 13th (PRE-K3-KINDERGARTEN)/ FEBRUARY 20th (GRADES 1-12). AFTER THESE DATES, CONTACT THE ADMISSIONS OFFICE.

Father's Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employed by: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Mother's Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Email: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employed by: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

If you, your spouse, or your child(ren) is self-employed or own a business (sole proprietor, partnership, or corporation), state the name of that business below and attach all IRS tax returns for that business for 2018:

Name of Business: \_\_\_\_\_

Name of student(s) for which you are applying for financial assistance:

Student's Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ 2020/2021 Grade: \_\_\_\_\_

Student's Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ 2020/2021 Grade: \_\_\_\_\_

Student's Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ 2020/2021 Grade: \_\_\_\_\_

Have you ever received financial assistance from Saint James School:      YES      NO

How much do you feel you can afford to pay yearly for your child(ren) to attend STJ? \_\_\_\_\_

Did you receive financial assistance from Saint James School for 2019-2020 Academic Year:    YES    NO

State the basis for this request for financial assistance: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Has any other individual paid any portion of the tuition or fees for any of your children in the past? Yes No  
If Yes, please complete the following:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Occupation: \_\_\_\_\_ Employed by: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Portion of tuition/fees they paid: \_\_\_\_\_

Portion of tuition/fees you paid: \_\_\_\_\_

Do you expect this person to continue to pay a portion of the tuition or fees for any of your children: YES NO

If NO, why not? \_\_\_\_\_

Information provided to the School and Student Service for Financial Aid (SSS) will be used to determine the applying parent's portion of tuition due for the 2020-2021 academic year. Any other party must pay full tuition for the portion for which they are responsible. In cases involving separation or divorce, both custodial and non-custodial households are required to complete the SSS Parent's Financial Statement (PFS). Saint James will take into account the custodial and non-custodial parents' spouse's income.

Financial assistance at Saint James School covers tuition only. It does not cover books, after school programs, or other school-related fees and expenses. While Saint James School will take into consideration previous financial aid arrangements, the school cannot guarantee future financial assistance will be the same as prior years. Decisions will be based on the SSS recommendation, the criteria for financial assistance established by the school's Board of Trustees, the approved budgetary limits on financial assistance, and the family's financial need compared to the need of other applicants.

By signing below, I certify that all of the information on this form is true and complete. I acknowledge that intentionally providing false or misleading information will result in automatic denial of financial assistance. I further authorize Saint James School to perform a credit check on any individuals listed on my tax returns.

Note: If two parents/guardians are applying for financial assistance or are listed on the accompanying tax returns, both must sign this form.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

You must fill out the Parent's Financial Statement online at [sssbynais.org/parents](http://sssbynais.org/parents) for your financial assistance application to be complete.

For Early Decision Notification of New Families, the complete application is due to the business office February 13th (Pre-K3-K5) or February 20th (1-12). After these dates, contact the Admissions Office.

# APPLYING FOR FINANCIAL AID FOR THE 2020-2021 ACADEMIC YEAR

We partner 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).

The PFS is a comprehensive application that will take some time to complete. Give yourself the time you need by not waiting until the deadline to begin. You'll need your most recent tax return before beginning the PFS. We also recommend that you review the wide range of materials that SSS has put together to help families with the financial aid process. They can be found at [ssbynais.org/parents](https://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 October 2, 2019, go to <https://sss.secure.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, using the email address and password you set up last year.
- Begin a PFS for Academic Year 2020-21. You can log out of the PFS Online at any time, then return later to complete it.
- After you have pressed submit, you'll be brought to a payment screen. The fee of \$51.00 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 2020-21 button.
- From the PFS Online, click on the "My Documents" tab.
- On the "My Documents" page, you will see an upload button or a hyperlink next to a specific document name in the "Required Documents" section of the PFS. Clicking either the upload button or a hyperlink will lead you through a series of steps allowing you to name, locate and save the file.
- Once you have uploaded a document, the date will appear in the "Date Uploaded" column within minutes of the upload. Some tax documents go through a verification process. It can take up to 48 hours for the verification process to complete.

If you wish to submit required documents by mail, send to School and Student Services, PO Box 449, Randolph, MA 02368-0449. 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.**

## THE FOLLOWING IS KEY INFORMATION YOU NEED TO KNOW ABOUT OUR SCHOOL AS YOU COMPLETE THE PFS:

Our school's full name: Saint James School

Our school's SSS code: 6510

Contact information for our financial aid office: Elizabeth Fritz, 334-273-3010, efritz@stweb.org

**1<sup>st</sup> Round- New Pre-K3, K4, K5:** Due date for completing the PFS: February 13, 2020. Due date for submitting additional documents below: 2/13/20

**1<sup>st</sup> Round- New Grades 1-12:** Due date for completing the PFS: February 20, 2020. Due date for submitting additional documents below: 2/20/20

Documents we require you to submit, in addition to the PFS:

XX 2018 1040, 1040A or 1040EZ

XX 2018 W2 Form

XX 2019 W2 Form

XX 1099 Form for 2018

XX 1099 Form for 2019