



Blue Oak School

Financial Aid Information

2010-2011 School Year

Financial Aid Application Checklist

1. Complete the Parent Financial Statement (PFS)

- a) Starting on November 1, 2009, go to <http://sss.nais.org> and click on the prompt to begin your Parents' Financial Statement (PFS). You will be given a password that will allow you to return to your PFS at a later date before submitting it.
- b) Be sure to submit your PFS by the appropriate deadline. Please note deadlines so that grants are not delayed or forfeited due to late applications and/or a lack of funds.
- c) The school code for Blue Oak School is 2987 (item #5 on the PFS)

2. Submit Tax Documents

- a) Mail 2009 W-2's and 1099's, and a signed (but not dated) IRS form 4506-T to the SSS by NAIS Application Processing Center

3. Submit 2009 Federal Income Tax Return, including all schedules and forms

- a) Mail the 2009 Income Tax Return, including all schedules, and forms. (W-2's and 1099's should have already been sent to SSS by NAIS). Mail these required documents to the SSS by NAIS Application Processing Center
- b) The following documents should be mailed to SSS by NAIS if they are applicable:
 - Leave and Earning Statement for Military Families.
 - If your child has assets in a trust fund, please send a copy of the Trust Agreement.
- c) If you are self-employed and/or receive a 1099, please also submit:
 - Business/Farm Statement
 - A copy of your signed tax return for 2009 for your business.
 - If you are applying for financial aid at Blue Oak School for the first time, please also include your 2008 income tax return for your business.

By signing the PFS electronically, parents indicate that they have filled out the PFS with the best available knowledge, and that they agree to inform the School of any changes in their financial situation. Any variance from this may jeopardize a student's financial aid grant, no matter what stage of the process they are in.

Please submit all requested tax documents to: SSS by NAIS Application Processing Center
P.O. Box 449
Randolph, MA 02368-0449

Blue Oak School reserves the right to request additional financial information from financial aid applicants at any time.

Call (800) 344-8328 with any questions about SSS by NAIS or your PFS .

If you have questions about the Blue Oak School's Financial Aid Program, please contact Chris Bezsylko at cbezsylko@blueoakschool.org or 707-261-4522.

Helpful Hints for Completing the Financial Aid Application

1. Please note deadlines so that grants are not delayed or forfeited due to late applications and/or a lack of funds.
2. You only have to complete one PFS, even if you have several children applying for aid at Blue Oak School and/or other SSS by NAIS subscriber schools.
3. For item 7, Blue Oak School's code number is 2987. Blue Oak School recommends that families request the Report of Family Need. You can receive this by filling in code 9000 and Family Report in item 7.
4. Fill in dollar amounts only.
5. Use good faith estimates for items where you may not know the exact number.
6. Do not wait to complete your tax return to complete your PFS.
7. Some items require a brief explanation. Please fill in those spaces provided. Missing explanations may delay and/or alter your child's financial aid award.
8. Any additional information or special circumstances the family would like to make known can be done through a letter / email to the Financial Aid Committee, care of Chris Bezsytko.
9. Keep track of your SSS by NAIS login and passwords, as you will use them to see your PFS and in future years.
10. When submitting IRS Form 4506-T, sign but do not date the form.

What Happens Next?

Once the PFS has been submitted, Blue Oak School's Financial Aid Committee will review each file. The Financial Aid Committee bases their preliminary grants on the information provided on the PFS and the Report of Family Contribution (RFC). The family's Federal Income Tax Return will provide additional information which may cause the School to adjust grants as needed.

Families of current Blue Oak School students who file the PFS on time will receive a preliminary financial aid award letter with their re-enrollment contracts in mid-winter. No financial aid award will be finalized until the financial aid application is complete and all required documents have been submitted to SSS by NAIS.

Financial Aid Frequently Asked Questions

Financial Aid Philosophy

The purpose of financial aid is to assist families who would not otherwise have the resources to attend Blue Oak School. The School's generous need-based financial assistance program supports our mission to provide the best educational environment to children of diverse backgrounds and interests. From its inception, the School has been dedicated to building a student body that accurately reflects the population of the Napa Valley and its surrounding areas. More than 35% of Blue Oak School students receive financial aid.

Blue Oak School offers Financial Aid on a proven-need basis. For 2009-2010, Blue Oak School made grants of over **\$600,000 to more than 50 students**. As Admission and Financial Aid decisions are made independently, families should not let cost be a factor in pursuing the application process. We encourage families to begin the application process, and concurrently to apply for financial aid.

Confidentiality

The Financial Aid Committee maintains strict confidentiality over financial aid files. Faculty and students are not informed of financial aid decisions. The School trusts that the family will keep the same discretion regarding awards and decisions.

Will applying for financial aid have an impact on the admissions decision for my child?

No. The School operates under a need-blind admission policy and is committed to providing access to qualified students, regardless of their financial situation.

What does SSS do?

SSS uses a methodology to compute a family's ability to pay for educational expenses for their children. Most independent schools in the Bay Area use SSS.

How is the Family Contribution calculated?

The family contribution is determined through a methodology developed by SSS. This methodology takes into consideration gross taxable and non-taxable income, assets, liabilities, family size and the number of children in tuition charging schools or colleges. After allowances for basic necessities and required taxes, a portion of remaining resources are considered available for education on a sliding scale.

What is the range of aid that is given?

Blue Oak School financial aid awards range from a small percent of tuition to almost full tuition. All families will pay some tuition.

Do I have to reapply each year for Financial Aid?

Yes. Each student's need is recalculated annually. Therefore, parents are required to submit the PFS along with the other required documentation each year.

What kind of financial aid awards can my family expect in following years?

Assuming that your family's financial status does not change dramatically, funding will generally be renewed at previous levels of funding.

Are there any merit awards available at Blue Oak School to applicants?

All of the financial aid awards available at the School are based on proven financial need.

If I am single, divorced, or no longer living with my child's other parent, what information will the Financial Aid Committee require in order to determine an award?

The Financial Aid Committee expects that all parents will contribute financially to their child's tuition. Each household is expected to submit a completed PFS form to SSS as well as all of the required documentation in order for the School to gain a realistic picture of family resources. If the non-custodial parent refuses to comply, the Financial Aid Committee will determine whether or not the family will be eligible for an award. If the custodial parent has not heard from the noncustodial parent for a period of time to be determined by the Financial Aid Committee, forms may not be required. However, a letter of verification from a third party (minister, attorney, social worker, etc.) will be required. The Financial Aid Committee may request a copy of the divorce decree; however, it may choose not to abide by it. Each situation is unique and will be handled on an individual basis.

If I am living with someone who is not my child's biological parent or I am remarried, how will the Financial Aid Committee review my child's file?

In situations such as and similar to this, Blue Oak School requires financial information from all adults involved in the applicant's life.

If my child lives with his/her guardians, what information will the Financial Aid Committee require?

Children who are living with guardians will be reviewed on an individual basis. However, if the parents are still living and are claiming their child(ren) on their tax return, the parents and guardians must complete the PFS and submit it to SSS. If other family members have custody, they must also complete the PFS. The Financial Aid Committee will also need copies of proof of custody.

If we cannot pay the Family Contribution noted in the Award Letter, is there an appeal process?

Yes. The format to appeal an award is described in the award letter. Each situation is unique and will be handled on an individual basis.

Is there a Financial Aid waiting list?

Yes. Blue Oak School may have more students who qualify for financial aid than the school has the ability to fund. Therefore, the School maintains a financial aid waiting list in the event that funds become available.

For more information about the Financial Aid process, please contact Chris Bezsytko, Director of Admission and Financial Aid, at cbezsytko@blueoakschool.org or 707-261-4522.