



Dear Summit Parent,

Summit School's Tuition Assistance program assists students with demonstrated financial need to experience an exceptional, independent private school education in kindergarten through 8th grade.

Steps to Apply for 2023-24 Tuition Assistance:

Step 1: Enroll at Summit School and pay the \$700 enrollment payment per student.

Enrollment Payment Refund Policy: Prior to the start of the school year for the student, if your student doesn't receive an award or the award is not sufficient, the \$700 payment will be refunded via check after the tuition assistance award is declined by the accept/decline due date of the award email and a letter of student withdrawal is provided to the Director of Admissions. **No refunds will be honored after accept/decline due date stated in the award email and no refund of the \$700 enrollment payment is eligible for students who have already started the current school year at Summit School or have been enrolled for more than 2 weeks.**

Step 2: Complete the online FACTS Grant and Aid Application. FACTS charges a non-refundable \$40 App fee.

Visit <https://online.factsmgt.com/aid> to create a login and complete the online application. Previous year applicants may use prior login information. Upload the required financial documentation requested in FACTS Grant and Aid:

- 2022 IRS Federal Income Tax Return including all supporting tax schedules for both parents. (If 2022 taxes have not yet been filed, submit 2021 tax return and the last 2022 pay statements for both parents.)
- All 2022 W-2 forms for both parents, including families with dual households.
- Documentation for Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and TANF (Temporary Assistance for Needy Families).
- If you have a business, please see the FACTS Grant and Aid application for additional, required tax forms such as Year-end Business Financial Balance Sheet, Year-end Profit and Loss Statement and the Cash Flow Report.

Step 3: Provide the following to the Summit School Business Office:

A letter that explains the circumstances that impact your ability to pay tuition.

- Please state estimated 2023-24 AZ Private School Tax Credits collected or will collect per student.
- Please include ESA contract \$ amount anticipated for 2023-24 school year.

Step 4: If do not have and are not seeking an Empowerment Scholarship Account (ESA) contract, please complete 2023-24 Institute for Better Education (IBE) application at www.ibescholarships.org directly to IBE before June 1, 2022. Summit School will utilize IBE Summit School Tax Credits to help fund awards for students who are not using ESA funding during the 2023-24 school year. Summit may request that you complete an application for another School Tuition Organization (STO) if we determine that we have school tax credits available at another STO.

Summit strongly encourages families to solicit tax credit donations on behalf of their child thru any of the STOs, such as IBE. Student recommended tax credit awards assist parents in funding remaining tuition that may be due. Each STO requires a new application to be completed each spring. Please visit our school website for upcoming parent tax credit meetings, please contact me with any questions.

Awards: Summit School primarily utilizes Summit School collected tax credits to fund Summit School Tuition Assistance awards. In the event that you have an ESA contract for the 2023-24 school year, the Tuition Assistance Committee will determine need based awards upon available funding outside of school tax credits. This amount of funding is limited.

APPLICATION DUE DATES: The Summit School Tuition Assistance Committee will review completed applications on a rolling basis. Applications received after April 28, 2022, are dependent upon remaining available funding.

| Rounds: | Application and Documents Due Date: | Award Decision Date: |
|----------------|--|-----------------------------|
| Round 1 | January 31, 2023 | February 23, 2023 |
| Round 2 | February 28, 2023 | March 30, 2023 |
| Round 3 | March 31, 2023 | April 27, 2023 |
| Round 4 | April 28, 2023 | May 25, 2023 |

Please note the following:

- Please contact a FACTS Customer Care Representative at 866-441-4637 with questions.
- All information is strictly confidential.
- A Summit School Tuition Assistance Award is for the application school year only. If a family has demonstrated financial need in a subsequent year, they will need to follow the application process.
- Summit School Tuition Assistance Awards are for tuition only and cannot be applied towards fees, such as the Summit PTO fee (\$90), Program Supply Fee (\$400), field trip fees, athletics, extended day and other fees.
- Appeal Process: Tuition Assistance awards are carefully assessed on financial need and available school funding. In the event that financial circumstances have changed after the family has accepted the award, the family may appeal the award by providing both a letter of appeal that explains any changes in financial situation that have occurred since receiving their award and by providing financial and other documentation that substantiates the change in financial need to the school business office.

Sincerely,

Carrie Slade
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