



How to Apply for Financial Aid

We partner with TADS & School and Student Services (SSS) by Community Brands in our Financial Aid process. To begin your Financial Aid application, you will complete the SSS Parents' Financial Statement (PFS) then submit the required documents for our school indicated below.



Plan ahead and know your deadlines

- This comprehensive application will take some time to complete. Give yourself the time you need by not waiting until our deadline approaches. You are required to submit your 2023 Tax Returns to complete the Financial Aid Application, so prepare your taxes as soon as possible. You can use an estimate for the Parents' Financial Statement (PFS), but your 2023 Tax Return is required for a complete application.



Complete your Parents' Financial Statement (PFS) online

- Beginning December 15, 2023, go the Family Portal at <https://sssandtadsfa.my.site.com/familyportal/FamilyLogin> Create your Family Portal account with your email address and password. You will need to create a new account even if you applied for Financial Aid last year.
- Create a Parents' Financial Statement (PFS) for Academic Year 2024-2025. You can log out at any time and return later to finish. Please complete the PFS by February
- When all PFS sections are complete with green checks, the Submit & Pay button activates. Follow prompts to the payment screen. The \$60 fee is non-refundable. Once your PFS is submitted, it cannot be withdrawn from the system.
- After you pay for and submit your PFS, access to "My Documents" activates to upload required documents by February 28, 2023 as part of your application.



How to submit your required documents online

- Prepare your document files for uploading. Make sure the documents are on your computer and each specific form is saved as a separate file. Examples: a.) 1 PDF file for the 1040 with all schedules and worksheets included, b.) each W2 saved as its own file. Remove any security or password protection from your files.
- Return to your Family Portal account and confirm you are on the Academic Year 2024-2025 Dashboard.
- Open "My Documents" from the Dashboard.
- In the "Required Documents" section, use the Upload button or link associated with the specific document type. Follow prompts to locate, select, and confirm the file to upload.
- Click the Submit button to complete your upload. The date will appear in the "Date Uploaded" column within minutes of the upload. Repeat this process until all required documents are submitted by their deadlines.

Required Documents

Tax Return

Tax Year: 2023 2022

W2 Form

1040 (with all schedules and worksheets)*

1099 Form

Tax Year: 2023 2022

Paycheck

Key Information

Our school's full name: Emerson Waldorf School

Our SSS Code: 200871

Contact Information: Bob Roberson | finance@emersonwaldorf.org

Deadline for completing PFS: **January 30, 2024**

Deadline for uploading required documents:

2022 Tax Documents **January 30, 2024**

2023 Tax Documents **April 15, 2024**

*New students who apply to Emerson Waldorf School after the January 30 deadline should complete their application as soon as possible.