



January 21, 2021

Dear 2021-22 Financial Aid Applicant,

Thank you for your interest in applying for assistance from The First School Financial Aid Trust (Trust). The Trust is an independent 501(c)(3) non-profit organization administered by a Board of Trustees in cooperation with The First School, LLC. The Trust supports children who would not be able to attend The First School without tuition assistance.

Like many other financial aid programs, the Trust works with School and Student Services (SSS), an independent organization that analyzes your family's financial information and determines a suggested contribution toward educational expenses. This process ensures uniformity and fairness. The Trust's Allocation Committee will carefully review the SSS recommendation and the information in your Financial Aid Application and make a final determination. Subject to the availability of proceeds from fundraising efforts, the Trust strives to provide continuing assistance to existing aid families based on need.

If you wish to apply for financial aid for the 2021-22 school year, please complete a new Parents' Financial Statement (PFS) through the SSS website and submit a new Financial Aid Application to the Trust by hand or mail to the address below by **March 15, 2021**. All information submitted to the Trust and this Committee will be held in strict confidence.

If your child is not currently attending The First School, please also submit an application for admission.

The Trust appreciates your patience and cooperation through the application and review process. If you have any questions or require assistance, please contact the Trust at financialaidtrust@thefirstschool.org.

Sincerely,

The First School Financial Aid Trust

1810 Broadway, Santa Monica, California 90404
T: 310.450.5022 E: financialaidtrust@thefirstschool.org
Tax ID No. 95-7092089



2021-22 FINANCIAL AID INSTRUCTIONS & KEY DATES

Please complete **both** of the following steps by Monday, **March 15, 2021**:

STEP ONE

Fill out and submit a Parents' Financial Statement (PFS) online at www.sssbynais.org/parents.

Our school name is The First School and our SSS code is 2274. You will be asked to provide information from your 2020 Income Tax Return and upload a copy. If you have not completed your 2020 Return before you fill out the PFS, you can estimate certain responses based on your 2019 Return and upload a copy of your 2019 Return.

STEP TWO

Fill out and submit The First School Financial Aid Application, along with a copy of your 2020 (or 2019) Income Tax Return, to the Trust by hand or mail to The First School Financial Aid Trust, 1810 Broadway, Santa Monica CA 90404.

QUESTIONS? UNABLE TO PAY THE SSS PROCESSING FEE?

We understand that this process can be daunting. If you would like assistance with the PFS, please contact the SSS helpline at 1-800-344-8328. The SSS form is available in Spanish on the SSS website, but the final PFS must be submitted in English.

If you are unable to pay for the SSS processing fee, you may request a waiver by sending an email to financialaidtrust@thefirstschool.org.

NOTIFICATION OF FINANCIAL AID DECISION

On **May 1, 2021**, the Trust will mail financial aid notifications to all applicants.



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2021-22 FINANCIAL AID APPLICATION

Please complete a separate form for each child

CHILD INFORMATION					
Last Name:		First Name:		Middle Name:	
DOB (mm/dd/yy):		Gender:		SSN:	
School Site: (circle one)	Toddler	Stay & Play	Ocean Park	Broadway	Pre-K
Lives with: (circle one)	Both Parents	Father	Mother	Other/Guardian_____	
Ethnicity: (optional/circle all that apply)		African American	Asian American	Caucasian	Latino/a
		Native American	Other_____		
Languages used by child:		Language(s) used in home:			
PARENT #1 INFORMATION					
Last Name:		First Name:		Middle Name:	
Home Address:		City:		Zip:	
Occupation:		Employer:		Email:	
Home Phone:		Work Phone:		Cell Phone:	
PARENT #2 INFORMATION					
Last Name:		First Name:		Middle Name:	
Home Address:		City:		Zip:	
Occupation:		Employer:		Email:	
Home Phone:		Work Phone:		Cell Phone:	
FAMILY INFORMATION					
Please tell us about your other children, if any					
Name:	Age:	Current School:	Public/Private:	Tuition paid last year:	
Parents are: (circle one)	Married	Separated	Divorced	Single	Other_____

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APPLICATION (page 2)

Please provide the amount that you earn/spend each month.

For any annual, quarterly, or intermittent amounts, please estimate a monthly average.

MONTHLY INCOME			
Net Salaries (after taxes)	\$	Net Business Income (self-employed)	\$
Interest/Dividends	\$	Property Rental	\$
Alimony/Child Support	\$	Other Income	\$
		TOTAL MONTHLY INCOME	\$
MONTHLY EXPENSES			
Mortgage	\$	School Tuition	\$
Rent	\$	Summer Camps	\$
Property Taxes	\$	Day Care	\$
Home or Renters Insurance	\$	Extracurricular Classes	\$
Household Utilities	\$	Vacations	\$
Cable, Telephone, Internet	\$	Club Dues	\$
Cell Phone	\$	Donations/Gifts	\$
Nanny/Babysitter	\$	Life Insurance	\$
Gardener	\$	Child Support/Alimony	\$
Food	\$	Retirement	\$
Car Loan	\$	Savings	\$
Car Lease	\$	Credit Cards	\$
Car Insurance	\$	Medical Insurance	\$
Car Repairs	\$	Medications	\$
Gas	\$	Doctors/Hospitals	\$
Clothing	\$	Other	\$
		TOTAL MONTHLY EXPENSES	\$
		TOTAL CREDIT CARD DEBT	\$



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APPLICATION (page 3)

Please complete the following sections and sign your name(s) at the bottom.

PLEASE PROVIDE ANY ADDITIONAL INFORMATION YOU WOULD LIKE US TO CONSIDER AS PART OF YOUR APPLICATION FOR FINANCIAL AID.

ARE THERE ANY OTHER NAMES (MAIDEN NAME, ALIASES) ASSOCIATED WITH YOUR ASSETS? IF SO, PLEASE LIST:			
Parent #1		Parent #2	

HOW MUCH CAN YOU CONTRIBUTE PER MONTH TO YOUR CHILD’S FIRST SCHOOL TUITION?
\$

We declare that all of the information reported in our Application for Financial Aid is true, correct, and complete to the best of our knowledge. We agree that we are responsible to inform The First School Financial Aid Trust of any change in circumstances which may modify our eligibility for financial aid. We understand that, if any information in our Application proves to be false, the Trust may reevaluate our financial status and take any and all actions that are necessary to recover some or all of the financial aid that we have received.			
Parent #1 Signature		Date	
Parent #2 Signature		Date	

For office use only	AG		FC		CHA	
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INSTRUCTIONS FOR SSS ONLINE APPLICATION

We partner with School and Student Services (SSS) by the National Association of Independent Schools (NAIS) in our financial aid process. To begin your application, please fill out and submit the Parents' Financial Statement (PFS) on the SSS website.

The PFS is a comprehensive application that will take some time to complete. We recommend that you begin the PFS as soon as possible and not wait until the deadline. You will need your most recent tax return before starting the PFS. We also encourage you to review the wide range of materials that SSS has put together to help families with the financial aid process. The materials are located at www.sssbynais.org/parents.

We use the information in your PFS as a starting point, but we also consider our school policies, practices, and available budget. We will mail all financial aid decisions on May 1, 2021.

HOW TO COMPLETE THE PFS ONLINE	HOW TO SUBMIT ADDITIONAL DOCUMENTS ONLINE
<ul style="list-style-type: none"> • Visit www.sssbynais.org/parents • Create your PFS Online account with your email address and a password. If you applied for financial aid last year, simply log in as a returning family using the same email and password that you set up last year. • Begin a PFS for Academic Year 2021-22. You can log out of PFS Online at any time and return later to complete it. • After you submit your completed PFS, you will see a payment screen. The fee of \$42 is nonrefundable. Once you submit your PFS, you cannot withdraw it from the SSS system. • After you pay for your PFS, you will have access to a section called "Manage Documents." This is where you will upload the additional documents that we require. 	<ul style="list-style-type: none"> • Prepare your documents to be uploaded. Make sure the documents are on your computer and that each document is saved as a separate file. Remove any security or passwords from the files. • Return to PFS Online and log in. • Click the button for Academic Year 2021-22. Then click on the "My Documents" tab. • On the "My Documents" page, you will see an upload button or hyperlink next to a specific document name in the "Required Documents" section of the PFS. Click the upload button or the hyperlink and it will lead you through a series of steps to name, locate, and save the file. • Within a few minutes after you upload a document, the date will appear in the "Date Uploaded" column. Some of the documents go through a verification process, which can take up to 48 hours to complete.

If you wish to submit the Required Documents by mail, please send them to: School and Student Services, PO Box 449, Randolph, MA 02368-0449. If you wish to submit the Required Documents via an overnight service, please send them to: SSS by NAIS, Application Processing Center, 15 Dan Road, Suite 102, Canton, MA 02021.

If you need any assistance completing the PFS or uploading Required Documents, please contact SSS customer service at 1-800-344-8328.

KEY INFORMATION ABOUT OUR SCHOOL FOR YOUR PFS
Our school's full name: The First School
Our school's SSS code: 2274

1810 Broadway, Santa Monica, California 90404
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Tax ID No. 95-7092089



TOP 10 TIPS FOR APPLYING FOR FINANCIAL AID

<p>1. Complete only one PFS per household. You can apply for aid to any number of schools for any number of children using just one PFS for the same flat fee.</p>	<p>6. Estimate your taxes. We realize most forms are not available until late January. If you don't have your current year's taxes available, it's okay to estimate your answers based on your prior year's tax return.</p>
<p>2. Use your legal name. Make sure your name on your PFS appears exactly the way your name appears on your tax documents.</p>	<p>7. Don't forget the cover sheet. If you mail the additional required documents to SSS, please include the SSS cover sheet. Your documents will then be properly matched to your application and you'll avoid delays. Give yourself at least 10 days before the deadline to allow for mail delivery and SSS processing time.</p>
<p>3. Enter whole numbers. When entering numbers, do not use decimals or cents. Simply round up to the nearest whole number. All monetary amounts must be in US Dollars.</p>	<p>8. Tell your story. Offer explanations when requested, so your story or situation is clear and understandable to those reviewing your application.</p>
<p>4. Differentiate applicants from dependents. Questions about "student applications" refer to your children who are applying for financial aid via the PFS. Questions about "other dependents" refer to the children (or adults) for whom you provide support but are not applying for financial aid.</p>	<p>9. Calculate debt and unusual expenses. When asked to report your credit card debt, enter your total outstanding balances and use the Notes section to specify the types of purchases you used these cards for. When asked to total your "unusual expenses," you'll find a list of the types of expenses you should and should not include.</p>
<p>5. Separate salary from profit. If you are a business owner or farm owner, you will be asked about your salary in the Family Income section. Enter only the amount that you actually draw as a salary (as reported on your W-2). You will provide information about profit/loss elsewhere in the PFS.</p>	<p>10. Be honest. Take time to carefully consider how much you think you can pay towards tuition on your own. The monthly budget of income and expenses on page two of our Application for Financial Aid will help you determine how much you can include for school costs.</p>

**If you have any questions, please contact the SSS Customer Service Center
by phone at 1-800-344-8328 or by email at sss@nais.org**