



Financial Appraisal Guidelines for Tuition Adjustment:

Every tuition reduction we provide directly affects our program and salary budgets and is therefore not intended to support a family's discretionary expenses such as large amounts of home or property equity, second homes, investment portfolios, etc. Having these does not preclude an adjustment, but will be taken into consideration in relation to the school's needs. Please help us deliver the best education possible by providing a fair and honest picture of your finances.

To participate in the tuition adjustment process for your family, complete the Tuition Adjustment Application enclosed. Please complete all questions, date and sign the Tuition Adjustment Application and return to the school by February 12, 2020 **with a copy of your completed and signed 2020 Federal Income Tax return.**

If you have not yet completed your 2020 Federal Income Tax return, please supply your 2019 return and any applicable supplemental documents. If you do not have a Federal Income Tax return to supply, you must provide official documentation for your current income. Examples include: 1099 forms, most recent paycheck, unemployment benefit statement, etc. Please contact the Business Coordinator with any questions or to clarify the documentation you need to supply.

Allocation Guidelines for Tuition Adjustment:

Your adjustment results will be mailed to you. Upon receipt please bring your papers to complete your PFC meeting with the Business Coordinator and Development Director to finalize your contract.

Appraisal Confidentiality:

The information provided by families participating in the tuition adjustment process will be handled in a confidential manner by all involved.

ADDITIONAL INSTRUCTIONS for Tuition Adjustment Application

In order to maintain a fair and transparent parent funding process, we ask that you please provide these details in your application for tuition adjustment:

- Please include any retirement savings on the adjustment application form.
- Please include all income and expenses for natural and step parents living in the same home.
- Please only include actual medical and health insurance expenses, not unused deductible or FSA/HSA covered (pre-tax) expenses.
- Please be sure to include ALL Earned Income Credit as well as Additional Child Tax Credit in the "Undeclared Income" portion of the application.

If you have questions, please feel free to contact Jennifer Cassellius (Business Coordinator) at: jen.cassellius@pleasantridgewaldorf.org