

## **Making Catholic Education Possible**

---

The Dallas Diocesan Education Endowment Trust was established for the purpose of providing tuition assistance to parents who desire to educate their children in a Catholic elementary and/or secondary school owned and operated by the Diocese of Dallas or one of its parishes. Financial aid may be available to eligible students accepted for admission and enrolled at one of these schools whose families can demonstrate the need for financial assistance in order to afford a Catholic school education. The funds are limited, therefore the following process will be used to best utilize the limited resources.

## **Eligibility**

---

To be eligible for tuition assistance, a family/student must:

- Demonstrate financial need;
- Meet the entrance requirements of the specific parochial/diocesan school;
- Be accepted for admission to grades K–12 and enrolled in that school; and
- Be current with all financial obligations due to any Catholic school within the diocese.

Secondary criteria for eligibility that may be considered include:

- The child's regular attendance;
- The likelihood of the child's long-term enrollment;
- The participation of the parents in school activities as expected of all parents;
- The family's payment history; and
- The student's maintenance of an academic level consistent with school standards and individual abilities.

Financial aid is awarded without regard for race, religion, gender, or ethnic origin.

## **Renewal**

---

Financial aid awards are made on an annual basis only, and families must re-apply every year in which tuition assistance is desired.

## **How to Apply**

---

Submit an online application through FACTS Grant and Aid Assessment website at [online.factsmgt.com](http://online.factsmgt.com). Contact an eligible parochial or diocesan school for assistance, if needed, in completing this application online. Applicants can also contact FACTS for assistance with the application by calling 1-866-315-9262.

## Timeline

---

- ✓ **November 1, 2017 – December 31, 2017:** Early Tuition Assistance Application Process for families with students in grades K-12. (Check with your school to see if this is available.)
- ✓ **Beginning February 21, 2018:** Decisions regarding financial assistance awards from the Early Application Process will be made available to schools.
- ✓ **January 1, 2018 – March 31, 2018:** Registration for the 2018-2019 school year at all Catholic schools.
- ✓ **January 1, 2018 – April 1, 2018:** Regular Tuition Assistance Application Process for families with students in grades K-12 who have been accepted for admission into a specific diocesan/parochial Catholic school.
- ✓ **Beginning May 16, 2018:** Decisions regarding financial assistance awarded from the Diocesan Tuition Assistance Funds will be made available to schools.
- ✓ **September 2018:** Tuition award checks will be dispersed to the schools after verification that the students awarded grants are in fact enrolled in the school.

## Important Information for Applying

---

- All financial information submitted by the family is strictly confidential.
- An application must be complete to be considered.
- Financial documents required to be submitted with the application include a completed 2017 Federal Form 1040 Income Tax Return (2 pages) including all tax schedules, and all 2017 W-2 and 1099 forms. See attached Checklist of required tax documents.
- When a single parent applies for financial aid, he or she must supply the school with the name and current address of the non-custodial parent. This requirement is waived only when information is supplied to the school indicating that the other parent is deceased or the whereabouts of that parent is unknown.
- A family with more than one child submits only one application for any or all of the children attending a tuition paying school.
- No financial assistance awards will be made for more than 50% of the total tuition.

- Families of financial aid recipients are expected to pay for non-tuition expenses incurred while the child attends school, including all fees, before and after school programs, transportation, and food expenses.
- FACTS Grant and Aid Assessment will provide the DEET Committee with the recommended maximum amount of assistance for which the family qualifies. The amount of tuition assistance to be awarded will be limited to the dollar amount available for distribution.
- Financial aid awards are non-transferrable and non-refundable and will be paid on behalf of the student/family directly to the school or schools specified for each student in the application.

## Tips for Applying for Aid

---

### 1) **Apply even if you don't think you'll qualify**

Between Diocesan aid, parishes, and schools, over \$8 million in tuition assistance was given out across the Diocese of Dallas in the 2016-2017 school year. Applying for aid through FACTS is the only way to be considered for Diocesan tuition assistance awards.

### 2) **Apply in the Early Application period (November 1-December 31)**

Applying early gives you the opportunity to use your prior year tax documents, saving you from having to wait to apply until your taxes have been completed in the spring.

### 3) **Gather all required documents before logging on to apply**

Taking a few moments to gather together all of the forms you'll need to apply will save you time and make the process smoother. See page 4 for a checklist of what you'll need.

### 4) **Verify your income by including all required supporting documents**

You must submit documentation of all your taxable and non-taxable income. If you file your taxes, this is provided through your tax return & supporting tax schedules. If you do not file taxes, you must provide a letter from your employer or other verifying document.

### 5) **Check your email regularly for updates & notifications from FACTS**

If you have any incomplete information, FACTS will email you. Add them to your "Safe Senders" list so their emails don't go to your junk mail.

# FACTS Grant & Aid Checklist

Here's what you'll need to complete your application...

Copy of 2017 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. **If applicant and co-applicant file separately, we require both tax returns for the same tax year.**

Copies of all 2017 W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the 2017 W-2 Wage and Tax Statements, please submit them as soon as they become available.

Copies of all supporting tax schedules if you have income from any of the following:

- Business – (Form 1040 Line 12) Attach Schedule C or C-EZ and Form 4562 Depreciation and Amortization
- Farm – (Form 1040 Line 18) Attach Schedule F and Form 4562 Depreciation and Amortization
- Rental Property – (Form 1040 Line 17) Attach Schedule E (page 1)
- S-Corporation – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1120S (4 pages), Schedule K-1 and Form 8825
- Partnership – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
- Estates and Trusts – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1041 and Schedule K-1

If you **do not file** income taxes and are unable to furnish a tax return or other tax schedules, you **must** provide copies of supporting documentation for Taxable Income, such as a letter from your employer.

Copies of all supporting documentation for household Non-Taxable Income such as: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF).

**NOTE:** Filling out your application carefully ensures that it will be complete and on time. If you list income or wages in your application, you must provide documentation to verify the source. Applications that do not include this supporting information are not "complete" and will not be considered for tuition assistance.

**Please allow 2 to 4 weeks for your application and supporting tax documents to be processed. FACTS is unable to verify receipt of documents until they are scanned into their system, which takes approximately 2 to 3 business days. If you have questions about your application status, please contact your school.**