FACTS Grant & Aid Assessment

FACTS Management makes quality education affordable for families by assisting schools in awarding financial aid. We work with schools to create a custom application and collect financial data so schools can make accurate award decisions based on financial need.

To apply for financial aid, visit online.factsmgt.com/aid.

After completing the online application, you will need to upload or fax all required supporting documentation. Uploaded documents must be in PDF format and the size of each document must be less than 20 MB. If you are unable to upload, fax the required documents to 866.315.9264. Please **DO NOT** use your mobile device to photo copy required documents due to problems with legibility.

The following supporting documents are required to complete the application process:

- Copy of the most recent **IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return** (the year of the tax return depends on the tax requirements of the school). If applicant and co-applicant file separately, we require both tax returns for the same tax year. We do not require State Tax Returns.

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

- Copies of all supporting tax documents if you have business income/loss from any of the following:
  Business - send Schedule C or C-EZ and Form 4562 Depreciation and Amortization
  Farm - send Schedule F and Form 4562 Depreciation and Amortization
  Rental Property - send Schedule E (page 1)
  S-Corporation - send Schedule E (page 2), Form 1120S (5 pages), Schedule K-1 and Form 8825
  Partnership - send Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
  Estates and Trusts - send Schedule E (page 2), Form 1041 and Schedule K-1

***IMPORTANT: If you file a tax return but do not have W-2 wages because you are self-employed, you will be required to submit a copy of your current year Federal Form 1040 Tax Return.**

- 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). If you do not file a tax return, you are required to provide documentation of all income received.

*All documentation received is imaged upon receipt and then destroyed.

You may login to your FACTS user account to review the status of your application. **Please allow 2 weeks processing time from the date you provided the supporting documents before inquiring further about receipt and/or status of the uploaded or faxed documents.** Application deadlines are set by the institution awarding the scholarships. If you are applying after the deadline, please contact your school to ensure that your application will be accepted.

*A non-refundable application fee may be required before your application will be submitted.

NOTE: Award decisions are made by the institution providing the scholarship, not FACTS.

For more information, visit FACTSmgt.com/grant-and-aid

PCI DSS Level 1 VALIDATED
SSAE 16 AUDITED