



Berkeley Rose Waldorf School

AFFORDABLE TUITION PROGRAM INFORMATION, INSTRUCTIONS, AND SUPPLEMENTAL FORM

Please note: this program is only available to Kindergarten and Grade School Applicants

Berkeley Rose Waldorf School is committed to sustaining cultural and socio-economic diversity. Each year Berkeley Rose offers reduced tuition to the maximum number of students possible through our Affordable Tuition Program (ATP). Families who are committed to providing a Waldorf education for their children, but are concerned about their ability to pay, should consider applying for financial aid. **At this time, we are not able to offer this program to nursery applicants.**

In order to fairly determine a family's financial need, the school uses a needs-analysis program developed by [School & Student Services](#) (SSS). Total income, assets, number of dependents, cost of educating all children in fee-charging institutions, extraordinary expenses, and retirement needs are all taken into consideration. In addition, we carefully consider individual circumstances made known to us in the school's own supplemental form.

Enclosed you will find Berkeley Rose Waldorf School's Affordable Tuition Program information, instructions and the request/supplemental form. The ATP Committee will allocate financial aid awards with decision letters for newly accepted families.

If you have any questions or need assistance as you complete the application process, please contact Karen Hunt, Enrollment Coordinator at (510) 859-7679 x 1, info@berkeleyrose.org or contact our Finance Chair, Robert Schorlemmer at (510) 859-7679, robert@berkeleyrose.org.

You should complete the tuition assistance application at the same time that you are applying for enrollment at Berkeley Rose.

INSTRUCTION FOR APPLYING FOR FINANCIAL AID

- 1) **Parent Financial Statement:** Complete online at [School of Student Services](#) (SSS)
- 2) **Supplemental Form:** Fill out and submit pages 3 and 4 of this document to the Berkeley Rose Waldorf School office, info@berkeleyrose.org.

The Berkeley Rose Waldorf School code is: **161011**

Complete the online Parents' Financial Statement (PFS) according to the instructions at [School & Student Services](#). Please be sure to explain in the Notes section all items that ask you to "Click here to add your explanation."

The school SSS code for Berkeley Rose Waldorf School is **161011**. You do not have to complete the entire application in one session. Your username and password will allow you to access and edit your data until you have submitted the online PFS and completed the payment section. The SSS Helpline number is (800) 344-8328. As part of the application process, in addition to completing an online application, you are asked to upload digital copies of personal financial documents to SSS. If you cannot create digital copies for upload please call the Berkeley Rose Waldorf School office at (510) 859-7679 for assistance.

Alternatively, you may mail copies of your financial documents to SSS. Please take into account that if you mail your documents, they may not be available online to the School for a couple of weeks after mailing. Remember to include the SSS Document Cover Sheet, available at <http://sssbynais.org/parents/apply>. Scroll down to the bottom of the page and select the download link under “Required Documents Cover Sheet.” Be sure to fill in the PFS Identification Number in the spot provided; this number will insure that your documents are linked to your online PFS.

Be sure to print out or photocopy and retain a copy of your completed PFS for reference should SSS or Berkeley Rose Waldorf School have need to contact you for discussion or clarification.

Documents that need to be uploaded or submitted with your application include:

- a. A copy of your final paycheck stub for the last tax year
- b. A copy of last year’s filed tax form(s) and the previous year’s tax forms
- c. A copy of your previous year’s Federal tax forms and schedules, including all tax forms related to a business or corporation

All documents and forms, except for the attached supplemental form, must be submitted to SSS and *not* to the school.

Any discrepancy between your income tax returns and the information on the application materials submitted may result in a reduction or retraction of your Affordable Tuition Grant.

INFORMATION FOR PARENTS WHO ARE SEPARATED OR DIVORCED

Berkeley Rose Waldorf School’s policy requires that separated or divorced parents requesting financial aid must BOTH complete financial aid forms. This includes the custodial and non-custodial parent. Each parent is required to submit all the documents stated above when applying for tuition assistance.

The term custodial parent refers to the parent with whom the student resides (or resided with most during the 12 months prior to the date of the application). The other parent is referred to as the non-custodial parent even in cases where parents legally share joint custody. Please remember that under joint custody, both parents are jointly liable for the full amount of tuition owed.

The School wishes to minimize any potential problems students might encounter as a result of this policy, so the Affordable Tuition Program Committee will gladly consider any special circumstances that might prevent compliance, such as:

1. The location of the non-custodial parent is unknown.
2. The non-custodial parent has had no contact with the family for more than three years.

Parents are assured that all information submitted is kept in the strictest confidence. Note: We will not be able to review a financial aid application until all the information required is received.



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AFFORDABLE TUITION PROGRAM (ATP) REQUEST

Berkeley Rose Waldorf School (SSS code 161011)

Please submit this page, front and back, to the Berkeley Rose Waldorf School

A) _____

Name of Student and Grade (**Not Available to Nursery Students**)

New Applicant Current Student Current Student on ATP

B) _____

Name of Student and Grade

New Applicant Current Student Current Student on ATP

C) _____

Name of Student and Grade

New Applicant Current Student Current Student on ATP

D) _____

Name of Student and Grade

New Applicant Current Student Current Student on ATP

Name of parents or guardians completing forms: _____

In the case of divorced or separated parents, each parent/guardian must complete all forms.

Please complete the Supplemental Financial Aid Form on page 4 (the reverse side).

SUPPLEMENTAL FINANCIAL AID FORM

Berkeley Rose Waldorf School (SSS code 161011)

1. Is there financial support for the student/family from sources other than the parent(s) or guardian(s)? This support can be for tuition, rent, vacations, out-of-school lessons, or other bills. Please be specific about amounts of such support.
2. Have you applied for and/or received financial aid for other children at other tuition fee-charging schools? Please specify the name(s) of the school(s) and the amount(s) received.
3. If your children are all of elementary school age and one or both parents are not employed full-time, please explain the circumstances.
4. For parents who are separated or divorced: please describe the degree of contact the student has had with the non-custodial parent during the last two years.
5. If you have made a voluntary career change in the last year that has affected your income, please explain the circumstances.
6. Has your income increased or decreased significantly? If yes, please explain.

If the Parent's Financial Statement (PFS) has not asked all the questions that address your particular financial situation, please attach a supplemental letter to this page.

Parent Signature

Date

Parent Signature

Date

Parent email address _____

Parent email address _____