Steps to Apply for Financial Aid

9401 Starcrest Drive
San Antonio, TX 78217
Ph: (210) 483-9234
Fx: (210) 655-5211
www.smhall.org

1. Before applying for financial aid, prospective families must first apply for admission to Saint Mary's Hall and indicate their interest in financial aid on the admission application. We will then mail information regarding the financial aid application process. Families who currently attend Saint Mary's Hall may proceed to step #2.

2. Complete the online financial aid application through the FAST web site. The deadline is **Friday, February 8, 2018**. The list below includes some of the documents that may be needed to complete your application:
   a. **Tax Forms:**
      - 2018 W-2 Wage and Tax statements
      - 2018 Federal 1040 or 1040A
      - Copies of all supporting tax schedules
      - Business – Schedule C or C-EZ (1040)
      - Farm – Schedule F (Form 1040)
      - Rental Property – Schedule E (Form 1040)
      - LLC – Schedule E, Form 1120S, and Schedule K-1
      - S Corporation – Schedule E, Form 1120S, and Schedule K-1
      - Partnership – Schedule E, Form 1120S, and Schedule K-1
      - Trusts – Schedule K-1

   b. **Household Information:**
      - Year-end statement from your mortgage holder
      - Bank statements
      - Brokerage statements
      - Insurance costs for home, life, auto, and health
      - Utility information
      - Medical records and expenses
      - Retirement account information
      - Vehicle, loan, and credit card balances
      - Vehicle estimated market value

3. After submitting your financial aid application, please scan or mail copies of the following to FAST by **Friday, February 8, 2019** using the instructions provided at the end of the FAST application:
   - 2018 Tax Returns (1040) **along with all supporting schedules**
   - 2018 W-2 forms
   - **Please do not send any tax forms to Saint Mary's Hall!**
   - Awards are distributed on a first-come, first-served basis to those who meet the deadline. Don't wait to submit!

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We understand that your 2018 Federal Tax Form 1040 may not be completed prior to February 8, 2019. If that is the case, you may notify the Office of Admission and then submit your 2017 tax documents instead; however, please know that all financial aid awards are tentative until receipt of 2018 returns and verification of supplied income, asset, and tax estimates. It is imperative that copies of these forms be forwarded to FAST once they are available.

No financial aid award is finalized until FAST receives a completed (signed) copy of the federal income tax return for the current year. We reserve the right to modify awards based on finalized returns.