



Steps to Apply for Financial Aid

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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.

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. Visit www.smhall.org/FAST and click on the FAST logo. The reverse page includes some of the documents that may be needed to complete your application. **The deadline is Friday, February 8, 2019.**
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 directly to Saint Mary's Hall**
4. Awards are distributed on a first-come, first-served basis to those who meet the deadline. Do not wait to submit!

The Financial Aid Committee understands 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.

Preparing to Submit the FAST (Financial Aid for School Tuition) Application

Once you have gathered your financial information, it takes approximately 30 to 45 minutes to complete the application online. Preparing to fill out this application takes about as long as preparing to file your taxes. In order to complete this form, there are a number of financial records you will need.

The following list includes some of the financial documents that are needed to complete your application (if applicable). **NOTE: The Financial Aid Committee cannot consider a financial aid application until tax documents are received and income is verified by FAST.**

IRS forms:

- W-2 Wage and Tax statement(s)
- 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

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