

Solomon Schechter Day School of Greater Boston
TRADITIONAL FINANCIAL AID TRANSMITTAL FORM
2010-2011 School Year



FORM A

Mail this form with materials listed on Form B Checklist to:
ISM 1316 North Union Street, Wilmington, DE 19806
Application Deadline is February 12, 2010

LEARNING & VALUES
for Life

Student Information

Student Name: _____ Grade in 2010/11 _____
Student Name: _____ Grade in 2010/11 _____
Student Name: _____ Grade in 2010/11 _____
Student Name: _____ Grade in 2010/11 _____

Parent/Guardian Information

Parent/ Guardian #1: _____
Parent/ Guardian #2: _____
Parents are: Married Separated Divorced Other _____

Contact Information for Financial Aid Correspondence

Mailing Address: _____
Day Phone: _____ Email: _____
Best way to leave a confidential message: Voice mail Email

Please check the appropriate boxes:

The online application for Traditional Financial Aid was completed on: _____
We are are not new applicants for admission to Schechter
We are are not new applicants for Financial Aid at Schechter

I/we received the following forms of financial support in the past year:

- Gift** (family/ friend/grandparent): \$ _____ Source _____
- Grant**: \$ _____ Source _____
- Loan**: \$ _____ Source _____
- Other financial assistance**: \$ _____ Source _____
- I/we **did not** receive any other financial support

Please use a separate page to provide other information regarding your financial situation.

The information reported in my/our Financial Aid application is, to the best of my/our knowledge and belief, complete and accurate. I/we understand that all existing financial obligations to the school must be fulfilled by June 30, 2010 in order to maintain my/our financial aid grant. I/ we understand that incomplete applications will not be processed and that late applications may not be funded, as Financial Aid dollars are limited and may be depleted after awards have been made to families who met the deadline.

Parent/ Guardian #1 signature and date

Parent/ Guardian #2 signature and date

Solomon Schechter Day School of Greater Boston
TRADITIONAL FINANCIAL AID
SUPPLEMENTAL MATERIALS CHECKLIST
2010-2011 School Year



FORM B

Mail the materials listed below with Form A Transmittal to:
ISM

LEARNING & VALUES
for Life

1316 North Union Street
Wilmington, DE 19806

Application Deadline is February 12, 2010

- ___ Traditional Financial Aid Transmittal Form A
- ___ Photocopies of all 2009 W-2 forms for each income earner in the family
- ___ Photocopies of all 2009 1040 forms signed by parents/ guardians and the tax preparer. Include copies of all schedules. Do not send Massachusetts state returns.
- ___ If you have income from a business, rental property, farm, S-corporation, partnership, estate or trust, you must submit copies of the following tax schedules along with your individual tax return:
 - ___ Business Schedule C or C-EZ (Form 1040)
 - ___ Rental Property Schedule E (Form 1040)
 - ___ Farm Schedule F (Form 1040) and Form 4562 Depreciation and Amortization
 - ___ S-Corporation Schedule E (Form 1040), Form 1120S, Schedule K-1, and Form 8825
 - ___ Partnership Schedule E (Form 1040), Form 1065, Schedule K-1, and Form 8825
 - ___ Estates and Trusts Schedule E (Form 1040), Form 1041, Schedule K-1, and Form 8825
- ___ Photocopy of your current lease, if you rent.
- ___ Documentation of the current assessed value of your home if you own. This may be listed on your most recent real estate tax bill, or you may obtain it from your local City Hall.
- ___ IRS Form 4506, Request for Copy of Tax Return.

ADDITIONAL INSTRUCTIONS

If you are submitting your online application or postmarking your materials after February 12, 2010, you must also send the items below to:

Solomon Schechter Day School
Financial Aid Office
125 Wells Avenue
Newton MA 02459

- ___ Late Application Notification Form C
- ___ Late fee of \$100. Please make check payable to Solomon Schechter Day School. This fee may be waived for families applying for first time admission to the school. This fee is not refundable, and it will not be applied to your tuition obligation.

Solomon Schechter Day School of Greater Boston
Traditional Financial Aid
LATE APPLICATION NOTIFICATION
2010-2011 School Year



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FORM C

If you are submitting your on-line application or postmarking your materials after February 12, 2010, you must send this form and your late fee of \$100 to:

Solomon Schechter Day School
Financial Aid Office
125 Wells Avenue
Newton MA 02459

Please make check payable to Solomon Schechter Day School. The \$100 late fee may be waived for families applying for first time admission to the school. This fee is not refundable, and it will not be applied to your tuition obligation.

Student Information

Student Name: _____ Grade in 2010/11 _____

Student Name: _____ Grade in 2010/11 _____

Student Name: _____ Grade in 2010/11 _____

Student Name: _____ Grade in 2010/11 _____

Parent/Guardian Information

Parent/ Guardian #1: _____

Parent/ Guardian #2: _____

Contact Information for Financial Aid Correspondence

Mailing Address: _____

Day Phone: _____ Email: _____

Best way to leave a confidential message: Voice mail Email

Please check the appropriate boxes:

The online application for Traditional Financial Aid was completed on: _____


We are are not new applicants for admission to Schechter

We are are not new applicants for Financial Aid at Schechter

**Solomon Schechter Day School of Greater Boston
INSTRUCTIONS FOR TRADITIONAL FINANCIAL AID
2010-2011 School Year**



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1. Log on to the Schechter website (www.ssdsboston.org) and click on the Financial Aid button on the left side of the page. Download and print Schechter's Traditional Financial Aid application materials. Gather the materials listed on the Financial Aid Application Checklist (Form B).
2. From the Financial Aid page on Schechter's website, click on the  symbol. This will take you to the confidential financial aid processing website. Download and print the Worksheet and gather the financial materials listed on the third page of the User Guide before starting work on the application.
3. Complete the online application and remit your \$34 payment on-line using Mastercard or Visa.
4. For divorced and separated families: both the custodial and non custodial parents must apply for Financial Aid. Divorced parents are unable to view each other's applications.
5. Complete and sign the Transmittal (Form A).
6. Complete IRS Form 4506 Request for Copy of Tax Return, lines 1-4 only and sign the bottom of the form. Do not send in the fee requested on this form.
7. Gather the supplemental materials listed on the Traditional Financial Aid Supplemental Materials Checklist (Form B).
8. Mail the Transmittal, Form 4506, and documents listed on the Checklist to ISM, 1316 North Union Street, Wilmington, DE 19806.
9. If you are applying after February 12, 2010, in addition to the steps above you must also send payment of \$100 with the Late Application Notification (Form C) to Solomon Schechter Day School, Financial Aid Office, 125 Wells Avenue, Newton, MA 02459. This fee may be waived for families applying for first time admission to the school. The late application fee is non-refundable and will not be applied to your tuition obligation.

Solomon Schechter Day School of Greater Boston
TRADITIONAL FINANCIAL AID
2010-2011 School Year



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Key Dates in Financial Aid

February 12, 2010	Financial aid applications are due
March 19, 2010	Financial aid decisions will be mailed
April 10, 2010	Due date for signed enrollment contract, tuition deposit, and signed Financial Aid letter

Tips Before You Begin Completing Your Online Application

- Review the downloadable User Guide, particularly the third page, which lists the IRS forms and household information you will need in order to complete the application.
- Download and print the worksheet and gather the financial materials listed in the User Guide before starting work on the application.
- If all of your information is ready, it should take 30-45 minutes to complete the process.
- As you click each field on the application, a “help bubble” pops up. Additional assistance is available by calling the FAST 24-hour Help Line at 877-326-FAST (3278), emailing help@ismfast.com, or by calling Joyce DiNobile, Associate Director of Finance, at 617-630-4521.
- Do not use the back button on your browser! Use the grey navigation bar at the left side of your screen to look at a previous page.
- The application does not have to be completed at one sitting, but each section must be complete in order for it to be saved. Your partially completed application may be saved so you can return and finish it later.
- Be sure to verify and print your answers BEFORE you pay the fee. After you pay, you can no longer access your application. If you discover an error after you have paid, you must contact the school, which can make the correction for you.

Request for Copy of Tax Return

- ▶ Do not sign this form unless all applicable lines have been completed.
Read the instructions on page 2.
- ▶ Request may be rejected if the form is incomplete, illegible, or any required line was blank at the time of signature.

OMB No. 1545-0429

Tip: You may be able to get your tax return or return information from other sources. If you had your tax return completed by a paid preparer, they should be able to provide you a copy of the return. The IRS can provide a **Tax Return Transcript** for many returns free of charge. The transcript provides most of the line entries from the tax return and usually contains the information that a third party (such as a mortgage company) requires. See **Form 4506-T**, Request for Transcript of Tax Return, or you can call 1-800-829-1040 to order a transcript.

1a Name shown on tax return. If a joint return, enter the name shown first.	1b First social security number on tax return or employer identification number (see instructions)
2a If a joint return, enter spouse's name shown on tax return.	2b Second social security number if joint tax return
3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code	

4 Previous address shown on the last return filed if different from line 3

5 If the tax return is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number. The IRS has no control over what the third party does with the tax return.

Caution: DO NOT SIGN this form if a third party requires you to complete Form 4506, and lines 6 and 7 are blank.

6 Tax return requested. (Form 1040, 1120, 941, etc.) and all attachments as originally submitted to the IRS, including Form(s) W-2, schedules, or amended returns. Copies of Forms 1040, 1040A, and 1040EZ are generally available for 7 years from filing before they are destroyed by law. Other returns may be available for a longer period of time. Enter only one return number. If you need more than one type of return, you must complete another Form 4506. ▶

Note. If the copies must be certified for court or administrative proceedings, check here.

7 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than eight years or periods, you must attach another Form 4506.

/ /	/ /	/ /	/ /
/ /	/ /	/ /	/ /

8 Fee. There is a \$57 fee for each return requested. Full payment must be included with your request or it will be rejected. Make your check or money order payable to "United States Treasury." Enter your SSN or EIN and "Form 4506 request" on your check or money order.	\$ 57.00
a Cost for each return	\$
b Number of returns requested on line 7	\$
c Total cost. Multiply line 8a by line 8b	\$

9 If we cannot find the tax return, we will refund the fee. If the refund should go to the third party listed on line 5, check here

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax return requested. If the request applies to a joint return, either husband or wife must sign. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506 on behalf of the taxpayer.

Sign Here	Signature (see instructions)	Date	Telephone number of taxpayer on line 1a or 2a ()
	Title (if line 1a above is a corporation, partnership, estate, or trust)		
	Spouse's signature	Date	

General Instructions

Section references are to the Internal Revenue Code.

Purpose of form. Use Form 4506 to request a copy of your tax return. You can also designate a third party to receive the tax return. See line 5.

How long will it take? It may take up to 60 calendar days for us to process your request.

Tip. Use Form 4506-T, Request for Transcript of Tax Return, to request tax return transcripts, tax account information, W-2 information, 1099 information, verification of non-filing, and record of account.

Where to file. Attach payment and mail Form 4506 to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual returns (Form 1040 series) and one for all other returns.

If you are requesting a return for more than one year and the chart below shows two different RAVS teams, send your request to the team based on the address of your most recent return.

Note. You can also call 1-800-829-1040 to request a transcript or get more information.

Chart for individual returns (Form 1040 series)

If you filed an individual return and lived in:	Mail to the "Internal Revenue Service" at:
District of Columbia, Maine, Maryland, Massachusetts, New Hampshire, New York, Vermont	RAIVS Team Stop 679 Andover, MA 05501
Alabama, Delaware, Florida, Georgia, North Carolina, Rhode Island, South Carolina, Virginia	RAIVS Team P.O. Box 47-421 Stop 91 Doraville, GA 30362
Kentucky, Louisiana, Mississippi, Tennessee, Texas, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team Stop 6716 AUSC Austin, TX 73301
Alaska, Arizona, California, Colorado, Hawaii, Idaho, Iowa, Kansas, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming	RAIVS Team Stop 37106 Fresno, CA 93888
Arkansas, Connecticut, Illinois, Indiana, Michigan, Missouri, New Jersey, Ohio, Pennsylvania, West Virginia	RAIVS Team Stop 6705-S-2 Kansas City, MO 64999

Chart for all other returns

If you lived in or your business was in:	Mail to the "Internal Revenue Service" at:
Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Georgia, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Tennessee, Texas, Utah, Washington, Wyoming, a foreign country, or A.P.O. or F.P.O. address	RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409
Connecticut, Delaware, District of Columbia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, West Virginia, Wisconsin	RAIVS Team P.O. Box 145500 Stop 2800 F Cincinnati, OH 45250

Specific Instructions

Line 1b. Enter your employer identification number (EIN) if you are requesting a copy of a business return. Otherwise, enter the first social security number (SSN) shown on the return. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

Signature and date. Form 4506 must be signed and dated by the taxpayer listed on line 1a or 2a. If you completed line 5 requesting the return be sent to a third party, the IRS must receive Form 4506 within 60 days of the date signed by the taxpayer or it will be rejected.

Individuals. Copies of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506 exactly as your name appeared on the original return. If you changed your name, also sign your current name.

Corporations. Generally, Form 4506 can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer.

Partnerships. Generally, Form 4506 can be signed by any person who was a member of the partnership during any part of the tax period requested on line 7.

All others. See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

Documentation. For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the Letters Testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign Form 4506 for a taxpayer only if this authority has been specifically delegated to the representative on Form 2848, line 5. Form 2848 showing the delegation must be attached to Form 4506.

Privacy Act and Paperwork Reduction Act Notice. We ask for the information on this form to establish your right to gain access to the requested return(s) under the Internal Revenue Code. We need this information to properly identify the return(s) and respond to your request. Sections 6103 and 6109 require you to provide this information, including your SSN or EIN, to process your request. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, and the District of Columbia for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506 will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form**, 10 min.; **Preparing the form**, 16 min.; and **Copying, assembling, and sending the form to the IRS**, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506 simpler, we would be happy to hear from you. You can write to Internal Revenue Service, Tax Products Coordinating Committee, SE:W:CAR:MP:T:T:SP, 1111 Constitution Ave. NW, IR-6526, Washington, DC 20224. Do not send the form to this address. Instead, see *Where to file* on this page.