



426 Knickerbocker Road, Tenafly, New Jersey 07631

Dear Parents:

Friends of Montessori Foundation (FoM) is primarily supported by members of The Montessori House School community. FoM provides support to its Montessori House School community in three ways: 1) needs-based financial aid for children to attend The Montessori House School in Tenafly, 2) enrichment activities for students attending The Montessori House School, and 3) educational activities for parents of such students.

This form collects financial information for families seeking needs-based financial aid for their children to attend The Montessori House School in Tenafly, NJ, for the school year starting September 2020 and ending June 2021. There are four sections to complete: 1) Personal information, 2) Income, 3) Assets and Obligations, and 4) Supporting Documents. Feel free to provide additional financial information that may help us evaluate your level of need.

With this application, please also include a short letter to FoM (1 page or less) explaining your interest in The Montessori House School for your child. In the letter, please indicate the amount you feel you can afford to pay for your child's tuition for the school year.

Note, FoM will only consider aid applications for students who have already submitted an application to enroll at The Montessori House School. Please submit a school application before submitting this aid application.

In addition, before you spend the time and effort to complete an aid application, you should be aware that FoM has very limited resources, and review the following guidelines. First, FoM considers first those applications for children to attend the Pre-Primary Montessori program, and only considers applicants for Montessori Kindergarten if budgeted funds for the year have not been exhausted. Further, FoM generally limits its grants of aid to 50% or less of the tuition for the half-day Pre-Primary Montessori program.

FoM makes grants at its discretion without regard to race, creed, color, nationality, ancestry, national origin, sex, gender orientation, or family status. Further, FoM determines at its discretion the amounts budgeted for aid, and the amount of any individual student's grant of aid (if any).

Finally, the deadline for submitting an application for aid for the 2020-21 school year is March 15, 2020.

If you have questions, please direct them to admissions@themontessorihouse.com.

1. Personal Information (we will get parent and contact information from school application)

Student Last Name: _____ First Name: _____

Date of Birth (mm/dd/yyyy): _____ Please circle program for which you applied: **FULL-DAY** or **HALF-DAY**

2. Income (supporting documentation – tax filings, forms, etc. in section 4)

	<u>Parent #1</u>		<u>Parent #2</u>	
Name	_____		_____	
	2019	2020 (est.)	2019	2020 (est.)
Wages				
Interest & Dividends				
Investment G/L				
Rents & Royalties				
From businesses owned in part any form (partnerships, S-Corp., LLC, etc.)				
Other payments (e.g. alimony, child support, private or government disability or pension, Social Security, retirement distributions, litigation proceeds)				
Gifts or grants from charities (incl. financial aid from schools)				
Payments or gifts made directly to student or other children in the household (Social Security, earnings, litigation proceeds, gifts). (list under Parent #1)				
Other (please describe)				
	_____	_____	_____	_____
TOTAL				

3. Assets and Obligations (please list for all members of household: parents, students, and other dependent children)

(Student Name: _____)

Assets Owned as of _____ (mm/dd/yyyy)	<u>Value</u>	<u>Description</u>
Bank Checking and Savings Account		
Investment Accounts (mutual fund, brokerage, etc.)		
Retirement Accounts (401k, 403b, 457, IRA, etc.)		
Principal Residence (current market value)		
Other Residence (current market value)		
Other real estate or land (current market value and indicate ownership percentage if < 100%)		
Businesses owned in whole or in part (partnerships, S-Corp., LLC, etc., indicate ownership percentage if < 100%)		
Automobiles (please list in description)		
Other Assets valued over \$10,000 (please list below)		
TOTAL		

3. Assets and Obligations (cont.)

(Student Name: _____)

Obligations as of _____ (mm/dd/yyyy)	<u>Amount Owed</u>	<u>Monthly Pymt</u>	<u>Description</u>
Credit Cards (only amount outstanding for more than 30 days)			
Mortgage Outstanding on Principal Residence (does monthly payment include property tax?)			
Student Debt Outstanding			
Mortgage Outstanding on other residences			
Automobile Loan Outstanding (if leased, list vehicles and monthly payments)			
Medical Debt Outstanding			
Other Debt Outstanding (list individually below if >\$10,000)			

TOTAL			
Tuition and childcare costs for non-applicant dependent children (net of financial aid) (please describe)			

4. Supporting Documents (please include for all members of household: parents, students, and other dependent children)

- 2019 Federal Tax Return (if not yet available, please provide 2018 filing plus 2019 W-2; any grant of aid will be provisional subject to review of 2019 filing. and material differences from the amounts listed above may result in withdrawal of the grant of aid).
- 2020 pay stubs issued the last 30 days.