



Fall 2023

Greetings!

I am pleased to announce the financial aid application season for the 2024-25 school year will open on **November 1, 2023**. You will find the links to the application and other important information regarding the financial aid process at [pcds.org/financialaid](https://pcds.org/financialaid).

**Important Dates for Current PCDS Families:**

**January 15, 2024** – The Parents' Financial Statement (PFS) serves as the financial aid application; this and all initial supporting documents must be filed and uploaded with *School and Student Services* (<https://www.solutionsbysss.com>) in your **My Documents** folder. (Please upload any 2023 W-2 or Form 1099 documents **as soon as you receive them**. Employers are required by law to issue these no later than January 31.)

**April 1, 2024** – 2023 IRS 1040 including all schedules must be filed and uploaded with SSS in your **My Documents** folder.

I highly recommend you **log into your account now** to verify all previous year documents are in your **My Documents** folder and that all are legible. If you submitted any documents directly to the financial aid office last season, you will need to make certain you upload them to your online file as soon as possible. When adding 2022 IRS 1040 or other prior year documents, make certain to select the 2023-24 school year tab. Any documents you add to your 2023-24 school year tab will automatically move over to your 2024-25 school year application once you complete your **new PFS**.

Thank you for your attention to the financial aid process. Submitting your family documents on time is vital for the committee to reach a timely decision. Financial aid contracts will be released in mid-February 2024.

Please note families who are currently enrolled in the 10-monthly payment plan will have a scheduled break from tuition for the month of February. This February tuition break should allow families to submit their enrollment deposit without the undue financial burden of two payments in one month.

Please let me know if you have any questions or concerns regarding the financial aid program at Phoenix Country Day School. I look forward to working with you this year!

Sincerely,

Kristie Berg  
Director of Financial Aid &  
Arizona Community Scholarships Program  
[kristie.berg@pcds.org](mailto:kristie.berg@pcds.org)

# Applying for financial aid

## 2024-2025 Academic Year



We partner with School and Student Services (SSS) in our financial aid process. To begin your financial aid application, you will complete the Parents' Financial Statement (PFS) then submit the required documents for our school indicated below.

The PFS is a comprehensive application that will take some time to complete. Give yourself the time you need by not waiting until our deadline approaches. You'll need your most recent tax return before beginning the PFS. We also recommend reviewing resources to help families with the financial aid process. They are found at <http://www.solutionsbysss.com/parents>.

**We will communicate our financial aid decision to you.** To make our decision, we use the information from the PFS as a starting point and consider our school policies, practices, and available budget.



### How to complete your Parents' Financial Statement (PFS) online



### How to submit your required documents online

- Beginning November 1, 2023, go to the Family Portal at <https://sssandtadsfa.my.site.com/familyportal>.
  - Create your Family Portal account with your email address and a password. If you applied for financial aid last year, log into the Family Portal as a Returning Family using your same email address and password.
  - Complete a PFS for Academic Year 2024-25. You can log out at any time and return later to finish it.
  - When all PFS sections are complete with green checks, the Submit & Pay button activates. Follow prompts to the payment screen. The \$60 fee is nonrefundable. Once your PFS is submitted, it cannot be withdrawn from the SSS system.
  - After you pay for and submit your PFS, the next step will require you to upload required documents by their deadlines as part of your application process.
- Prepare your document files for uploading. Make sure the documents are on your computer and each specific form is saved as a separate file. Examples: a) 1 PDF file for the 1040 with all schedules and worksheets included, b) each W2 saved as its own file. Remove any security or password protection from your files.
  - Return to your Family Portal account and confirm you are on the Academic Year 2024-25 Dashboard.
  - In the "Required Documents" section, use the Upload button or link associated with the specific document type. Follow prompts to locate, select, and confirm the file to upload.
  - Click the Submit button to complete your upload. The date will appear in the "Date Uploaded" column within minutes of the upload. Repeat this process until all required documents are submitted by their deadlines.

### Key information you need to know about our school as you complete the 2024-25 PFS:

Our school's full name: Phoenix Country Day School Our partner code: 5770

Contact information for our financial aid office: Kristie Berg, Director of Financial Aid & Arizona Community Scholarship Programs

Deadline for completing the PFS: Current Families January 15, 2024 Deadline for required documents: February 1, 2024

### Documents we require you to submit with your PFS:

<input type="checkbox"/> 1040 with all schedules and worksheets*	<input type="checkbox"/> W2 Form	<input type="checkbox"/> 1099 Form
Tax Year: <input type="checkbox"/> 2023 <input type="checkbox"/> 2022 <input type="checkbox"/> 2021	Tax Year: <input type="checkbox"/> 2023 <input type="checkbox"/> 2022 <input type="checkbox"/> 2021	Tax Year: <input type="checkbox"/> 2023 <input type="checkbox"/> 2022 <input type="checkbox"/> 2021

*\*Self-Employed Parents: Include all related business forms with your 1040 file (i.e., Schedule C, Schedule E, 1120, 1065, and K-1).*

Need help with your PFS or required documents?

Contact Family Support at (800) 344-8328 or [sssandtadsfa@communitybrands.com](mailto:sssandtadsfa@communitybrands.com).

