

Instructions For Current Students Who Are First Time Applicants For Financial Aid

Read ALL the instructions. Pay close attention to those items that are “boxed”

Financial Aid Grants will be emailed to current students on April 5, 2025. All responses to the financial aid information are due back by April 17, 2025. In order to be eligible to be considered for need-based financial aid, we must first have a complete financial aid file by **March 3, 2025**.

Please **return the following items to the Financial Aid Office by the deadline** to have a complete financial aid application file: Make sure you comply with each item and pay particular attention to each box.

1. **A copy of the PARENTS’ FINANCIAL STATEMENT (PFS) that you completed online through the School and Student Service for Financial Aid (SSS) in Princeton. Be sure to use the Wesleyan School code (1495) on this application. You must complete the PFS online. Go to <https://sssandtadsfa.my.site.com/familyportal> and follow the online instructions. The cost to complete the PFS online is approximately \$60. Please print out a copy of the PFS and return it to the Wesleyan Financial Aid Office with the other documents below.**

2. **A true copy of your signed, 2024 Federal Income Tax Return (Form 1040 including ALL Schedules) that you sent to the IRS. No estimates will be accepted. You must file your taxes early in order to meet the March 3 deadline. You do NOT need to submit a copy of your state income tax return.**

3. **A true copy of your signed, 2023 Federal Income Tax Return (Form 1040 including ALL Schedules) that you sent to the IRS. Again, you do NOT need to submit a copy of your state income tax return.**

4. **A copy of all W-2 Forms for both 2024 and 2023. If you are a consultant, a copy of all 1099 forms for both years. If self-employed include any business income tax returns appropriate for each year.**

5. If you are divorced, separated or have never been married, the custodial parent (and present spouse, if one) should send the PFS to the SSS in Princeton as described above. The non-custodial parent must also complete a separate PFS and submit it to the SSS in Princeton. The non-custodial parent must also submit a copy of their 2024 and 2023 Federal Income Tax Returns (Form 1040 including ALL Schedules). Wesleyan must receive this information before your financial aid request can be given consideration. If you have any questions regarding the applicability of this second PFS to your situation, please call the Financial Aid Office (ext. 2266).

6. A true copy of the student’s 2024 Federal Income Tax Return (Form 1040 including ALL Schedules), if the student filed a return.

7. IRS Form 8821. Complete Section 1 and Section 6. The other Sections are completed for you. This form is attached below. Wesleyan will keep this form on file and will only use it if needed to verify any submitted information.

You may receive an email from SSS asking you to send them a copy of your tax return and W-2 information. Ignore these emails. The only item that needs to be submitted to SSS is the PFS. **All other information, including a copy of the PFS, should be returned directly to the Financial Aid Office at Wesleyan.**

Note: Failure to complete these steps or to fully complete any of the forms listed in these steps may result in 1) your application being discarded or 2) the missing information being filled in by us so that it is a detriment to your case for financial aid. It is not the job of the financial aid office to track down missing or incomplete information.

The analysis of the PFS will be sent to us by SSS after SSS has received your completed PFS. From this and our own analysis of your overall financial situation, a determination will be made as to how much your family can contribute toward the cost of tuition. Please do not hesitate to call our office should you have any questions.

Billy Coxhead
Chief Financial Officer, 678-223-2266