

Accuracy and completeness help EA to efficiently and effectively review applications to make informed financial aid decisions. To help you submit your financial aid application within the Clarity platform, we have compiled a list of information and documents that you may want to pull together before you start the process.



With the proper information prepared, the application process should take approx. **30-60 minutes.**

## Expenses

Including a detailed listing of expenses is one of the most important pieces within a financial aid application. Being ready with this information at your fingertips will help you to complete the application with ease and without frustration. We understand some expense items below may not apply to your household.

<b>Monthly Rent/ Mortgage Cost</b>	Rental agreement, mortgage statement, property tax bills, and HOA invoices	<b>Student Loans</b>	Monthly amount paid
<b>Utilities</b>	Heating (electric, oil, gas), internet, phone, and any third-party sewage/trash/recycling bills	<b>Childcare/ Daycare</b>	Monthly payment amount made for these services, based on receipts/invoices
<b>Food &amp; Clothing</b>	Household budget, bank statements, and/or credit card charges to observe monthly averages	<b>Eldercare</b>	Monthly payment amount made for these services, based on receipts/invoices
<b>Transportation</b>	Car payment bills, gas receipts, public transportation, and rideshare costs	<b>Charitable Contributions</b>	What your household contributes annually to non-profit organizations, based on receipts
<b>Healthcare</b>	Premium amounts (medical, dental, vision) as noted on paystubs or through outside marketplace	<b>Union Dues</b>	Monthly amount paid
<b>Out-of-Pocket Medical</b>	What you paid for co-pays, deductibles, etc.; hospital and physician practice bills	<b>Child Support</b>	Monthly amount paid
		<b>Spousal Support/ Alimony</b>	Monthly amount paid
		<b>Other Out-of- Pocket Expenses</b>	Include detail about expenses paid for other household needs (e.g. summer camp for school-aged children, club sport fees)

## Assets

In the Clarity application, be prepared to provide the following information, as applicable:

- Amount of home equity, based on current market value
- Secondary home ownership (including rental properties)
- Vehicle ownership
- Bank account balances
- Retirement account balances
- Other brokerage/investment account balances (non-retirement)
- 529 account balances
- Other asset balances (e.g. trust money, annuities, etc.)

## School Questions

EA asks some school-specific questions to help better inform us about various expenses that households incur each year.

Be prepared to provide the following information under *School Questions* within the Clarity application, as applicable:

- Country club membership cost
- Estimated, annual vacation spend
- Detailed accounting of any club-level team sport participation, including associated costs related to training, travel, etc.
- Detailed accounting of expenses for camps and lessons for all children in the household

## Support

We are here to support you in the financial aid application process.

Reach out to Director of Financial Aid Jennifer Natale with any questions: [jnatale@episcopalacademy.org](mailto:jnatale@episcopalacademy.org) | 484.424.1404