

TUITION REFUND PROTECTION PLAN 2026–2027 SCHOOL YEAR

In the mutual interest of parents and The Montessori School of Raleigh, which operates Carolina Preparatory Academy for Middle and Upper School as a DBA (collectively, “the School”), participation in the School’s Tuition Refund Protection Plan (“TRPP”) is required unless the Comprehensive Fee, as defined below, for the 2026–2027 year has been paid in full under Payment Plan A (One–time) and participation in the TRPP is expressly waived in the Enrollment Contract.

Why does the School impose this obligation on parents?

Virtually all independent schools require an Enrollment Contract for the full payment of tuition for the entire academic year. The reason for this is clear: school expenses are incurred on an annual basis, and schools must take the position that refunds and/or cancellation of unpaid obligations cannot be made.

In the event that a student’s enrollment at the School is interrupted for a qualifying reason under this Plan, TRPP provides a partial refund of unused tuition (per the guidelines stated below) and reduces the family’s remaining tuition and fee obligation for the balance of the current academic year. TRPP is designed to help protect the School against unexpected tuition loss and to help protect families from bearing the full financial obligation of the Enrollment Contract if a covered withdrawal occurs. Families remain responsible for all tuition and fees except to the extent benefits are provided under this Plan.

<u>REFUNDS ARE MADE FOR:</u>	REFUND FORMULA: <i>To arrive at the amount of refund payment, take:</i>
MEDICAL WITHDRAWAL	
100% of the unused Comprehensive Fee, prorated. This is for any physical disability certified to and treated by a legally qualified physician.	100% of [Comprehensive Fee x (Days Withdrawn/Total Number of Days in the Academic Year)]
60% of the unused Comprehensive Fee, prorated, for a mental or nervous disability certified to and treated by a legally qualified medical professional.	60% of [Comprehensive Fee x (Days Withdrawn/Total Number of Days in the Academic Year)]

NON-MEDICAL WITHDRAWAL	
50% of the unused Comprehensive Fee, prorated, provided the student has attended a minimum of ten (10) days of the current academic year.	50% of [Comprehensive Fee x (Days Withdrawn/Total Number of Days in the Academic Year)]
DISMISSAL	
60% of the unused Comprehensive Fee, prorated, provided the student has attended a minimum of ten (10) days of the current academic year.	60% of [Comprehensive Fee x (Days of Dismissal/Total Number of Days in the Academic Year)]

Enrollment in the TRPP is contingent upon the full payment of the mandatory TRPP Fee, which is 2% of the Tuition Balance, as defined below. This mandatory TRPP Fee is to be paid with the first installment of the selected payment plan: July 1 if Payment Plan A (One-time); July 1 if Payment Plan B (Semester); June 1 if Payment Plan C (Monthly).

In the event of a separation from the School for any of the approved reasons, the TRPP refund, under the refund formula outlined above, will be handled by the School's Business Office. Some delay is an inevitable part of this process, as the School must gather information on any outstanding charges to the student's account before rendering a final accounting and/or a refund. The Non-Refundable Deposit, Non-Refundable New Family Fee (if applicable), TRPP Fee, Late Pick-Up Charges, Administrative Fees or Late Payment Fees (if applicable) will not be refunded.

For the purposes of determining TRPP eligibility, the School may consider the actual circumstances surrounding the withdrawal, regardless of how the withdrawal is characterized or described by the family. The School may require reasonable documentation or clarification from the family to determine the basis for the withdrawal and eligibility under this Plan. Any misrepresentation or omission of material facts related to the basis for withdrawal may result in denial of TRPP benefits.

As the specifics of TRPP are clearly outlined in this document, disputes or differing interpretations are extremely rare. If such a dispute should arise, however, it is understood by the terms of this document that the final decision-making authority will rest with the Head of School.

DEFINITIONS

1. The Comprehensive Fee is the Tuition Balance, as defined in Paragraph 2, plus any additional charges for enrollment in optional School programs and services such as All-Day Miners care, before-school care, after-school care, conference day care, and/or bus services. The Comprehensive Fee does not include any additional fees such as IB and/or AP testing fees; international or other parent-funded field trips, including Carolina Prep Project Week; or a

student's selective enrollment in auxiliary programming such as Studios, Spring Break Camp, or Summer Camps that may be assessed during the school year. These excluded fees are separate from the Comprehensive Fee, are not covered by the TRPP, and are non-refundable or subject to the refund policies of the applicable program or vendor.

2. The Tuition Balance is the total amount of tuition for the academic program in which the student enrolls, less any Tuition Assistance or Remission awards, any applicable discounts, and the Non-Refundable Deposit.
3. The academic year upon which refunds are based consists of instructional days in the school calendar, commencing with the first day of formal academic instruction. If the student enrolled mid-school year, the academic year upon which refunds are based consists of instructional days in the school calendar, commencing with the student's first day of class. Pre-season athletic practices, orientations, registration, staggered start dates, and graduation days are not included in the academic year.
4. "Withdrawal" means a complete, voluntary separation from the School for the remainder of the academic year. In accordance with the Enrollment Contract, notice of withdrawal must be provided in writing and consent from all legal parents/guardians is required. "Dismissal" means a complete, involuntary separation from the School for the remainder of the academic year, initiated by School authorities. Temporary absences, temporary suspension, or changes in program enrollment or attendance for any reason do not constitute withdrawal or dismissal and do not qualify as bases for any refund or claim.
5. Withdrawal due to a student's normal pregnancy or normal childbirth is defined for purposes of coverage as a non-medical withdrawal. Temporary absence for this reason is not a basis for claim.

TERMS OF TRPP COVERAGE

MEDICAL WITHDRAWAL

Coverage applies from the first day of classes of the academic year through the last day of the academic year. A medical withdrawal is limited to situations in which a student is unable to attend School for the remainder of the academic year due to a serious physical or medical condition that:

1. Qualifies as a disability under the Americans with Disabilities Act (ADA) by substantially limiting one or more major life activities; **and**
2. Prevents the student from participating in academic instruction or School-sponsored activities for a substantial portion of the academic year; **and**
3. Is being actively treated by a licensed healthcare provider who recommends that the student withdraw from School for medical reasons.

NON-MEDICAL WITHDRAWAL

Any withdrawal that does not meet **all** criteria above is considered a non-medical withdrawal. Coverage for non-medical withdrawals is for the entire academic year provided the student has attended a minimum of ten (10) school days of the current academic year, and the withdrawal does not fall within any of the exclusions listed below.

Non-Medical Conditions/Circumstances Excluded from Coverage

The following circumstances do not qualify for coverage under this Plan:

1. Any withdrawal or dismissal occurring before the student has attended a minimum of (10) school days of the academic year.
2. The School's temporary closure or temporary suspension of operations.
3. The School's inability to provide formal instruction on campus, provided that instruction is offered through online, remote, or other alternative means.
4. Withdrawal resulting from destruction, damage, or loss of use of School facilities; insurrection, rebellion, riot, civil commotion, any governmental order, war or acts of war (declared or undeclared); nuclear events (controlled or accidental); or participation in a riot.
5. Withdrawal due to a pandemic, epidemic, public health emergency, or fear of contagion.
6. Boycotting of classes or refusal to attend School for reasons unrelated to a qualifying medical condition.
7. Withdrawal due to changes in personnel, teachers, classroom assignments, groupings, or staffing configurations.

DISMISSAL

Coverage applies from the first day of classes of the academic year through the last day of the academic year.

Dismissal Conditions/Circumstances Excluded from Coverage

The following circumstances do not qualify for coverage under this Plan:

1. Dismissal for use or possession of drugs (any drug or agent classified as a narcotic, hallucinogenic, psychedelic, or having similar classification or effects). Exception: If a drug or agent is administered under legally qualified medical procedures.
2. Dismissal for actual violence, imminent violence, or threat of imminent violence or any physical aggression that may cause harm to others.
3. Dismissal for the possession of a weapon on School property, including School-owned or leased vehicles, or at School-sponsored events on or off School property. Weapons and replicas of weapons constitute any item used to threaten or cause actual harm, including but not limited to, firearms, knives, metal knuckles, chains, razors, explosives, poisonous or noxious gasses, or any other tool or instrument capable of inflicting bodily injury.