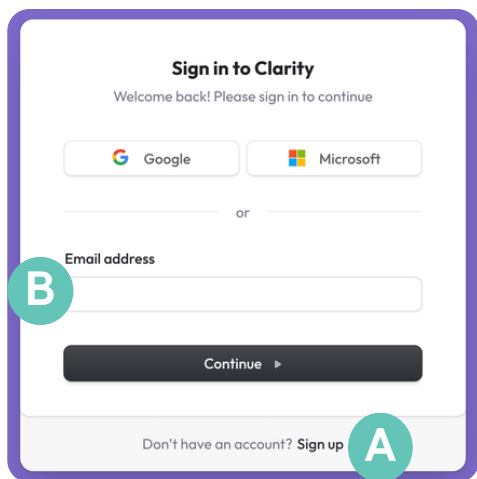


Family Application Guide

This guide will walk you step-by-step through the Clarity application for the 2027-2028 enrollment year.

LOGGING IN

The entire process will be completed at app.clarityapp.com



The screenshot shows the 'Sign in to Clarity' login page. At the top, it says 'Welcome back! Please sign in to continue'. Below this are two buttons for 'Google' and 'Microsoft'. In the center, there is a text input field labeled 'Email address' with a callout 'B' pointing to it. Below the input field is a 'Continue' button. At the bottom, there is a link that says 'Don't have an account? Sign up' with a callout 'A' pointing to it.

- A** Click "Sign Up" then create your account:
- Click "Create an account"
 - Provide your name and email
 - Create your password

- B** Log back in to your existing Clarity account

NOTE: All users must create a new Clarity account your first time using the system. The direct link for first-time users to sign up is auth.clarityapp.com/en/signup.

Your account will not be carried over from other financial aid systems you may have used in previous years.

Need more help?

We encourage you to keep this guide open as you complete your application to help answer questions and provide explanation when needed. But if you get stuck, you can contact us at: support@clarityapp.com

Before you begin

- 03** Important Tips Before You Begin
- 03** The Process
- 04** Your Portal

Step 1: People

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- School Questions
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- 29** Upload Additional Documents

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- 30** Hearing Back from School(s)
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IMPORTANT TIPS BEFORE YOU BEGIN

- ✓ Make a list of the schools you're applying to. Be sure to note their deadlines (both admission and financial aid) and requirements.
- ✓ You only need to complete one Clarity application per household. Your application will cover any number of schools using Clarity and any number of children in your household.
- ✓ Gathering documents and information like your most recent tax documents can help you complete the application.
- ✓ Throughout the application you will see this symbol:  Hover your mouse or tap your finger on this symbol to see helpful tips and explanations.
- ✓ Be sure to monitor your Clarity portal throughout the application process. Schools may require additional documents—those requirements will be displayed in the "Document Requests" section of your portal.
- ✓ While the Clarity application is designed to be easy enough to fill out in one sitting, you can save your work at any time and come back to it later. Be sure to always click the "Save and continue" button at the bottom of the page to save your work.

THE PROCESS



Complete the application

- Click "[Continue Application](#)" from your portal Home page to begin or continue your application.
- Complete your biographical information. add applying students and indicate which schools you're applying to.
- Sign and submit a tax verification form to give Clarity permission to pull your prior year tax returns. This means you won't need to upload any of them yourself!
- Complete your financial information.
- NOTE: The responsive application will shift the questions you see based on your answers, kind of like TurboTax.



Pay and Submit

- The Clarity application fee is \$65 and covers all the Clarity schools you're applying to and any number of children in your household.
- Once you submit your application, you will not be able to make changes to your tax filing status, indication of if you do or do not receive a United States W2, and information entered on the IRS tax verification form. Make sure you have indicated accurate social security number(s) and exact address used for filing of your 2025 taxes to avoid errors and delays.



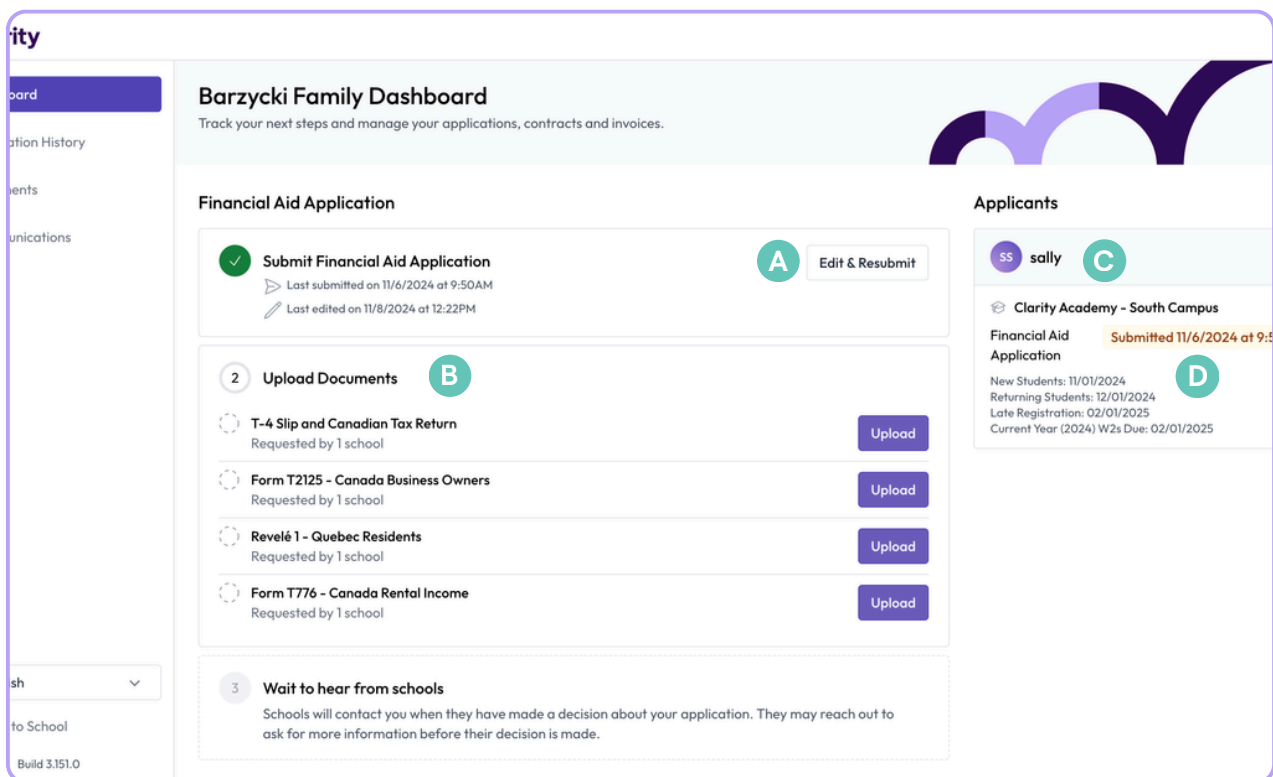
Upload any extra documents

- Schools may require additional documents in addition to last year's taxes.
- Check the "Document Requests" panel on your portal to see what you need to upload.

YOUR PORTAL HOME

From your portal homepage, you can:

- Access your application
- Review any additional document requirements
- Manage and upload documents
- View your student(s) and application status(es)



A Click to continue your application in progress

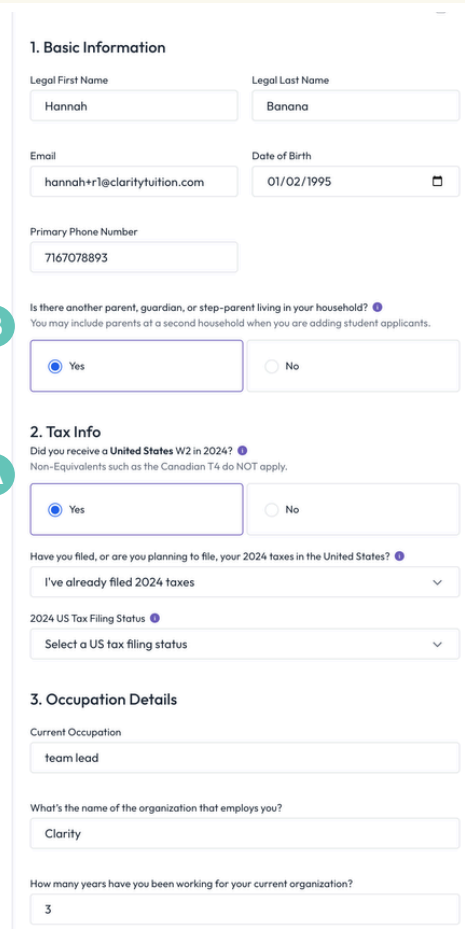
B View document requirements and upload

C View your applying students

D Monitor your application status at each school you are applying to

PARENTS OR GUARDIANS

- Every living biological parent and legal guardian will need to submit their information for an application to be considered complete.
- Start by telling us about yourself.
- Then list any additional parents or guardians living in your household.
- Later, you will have the opportunity to invite parents and guardians from outside of your household to create their own account and fill out a separate application.



The screenshot shows a web form titled "1. Basic Information". It contains several input fields: "Legal First Name" (Hannah), "Legal Last Name" (Banana), "Email" (hannah+r1@claritytuition.com), "Date of Birth" (01/02/1995), and "Primary Phone Number" (7167078893). Below these is a question "Is there another parent, guardian, or step-parent living in your household?" with a "Yes" radio button selected. A green circle with the letter "B" is next to this question. Below that is section "2. Tax Info" with a question "Did you receive a United States W2 in 2024?" and a "Yes" radio button selected. A green circle with the letter "A" is next to this question. Below that are two dropdown menus: "Have you filed, or are you planning to file, your 2024 taxes in the United States?" (I've already filed 2024 taxes) and "2024 US Tax Filing Status" (Select a US tax filing status). Below that is section "3. Occupation Details" with three input fields: "Current Occupation" (team lead), "What's the name of the organization that employs you?" (Clarity), and "How many years have you been working for your current organization?" (3).

A

If you received only a 1099 in your most recent tax year, answer "No" to this question.

B

Only answer "Yes" to this question if there is another parent or guardian living at your same address. If you are divorced or separated, answer "No". You will be able to add additional guardians living outside your home later in the application.

PARENTS OR GUARDIANS CONT.

- Complete Occupation Details for each parent or guardian.

3. Occupation Details

Current Occupation

What's the name of the organization that employs you?

How many years have you been working for your current organization?

A

What is your current occupation?
Enter "N/A" if not applicable.

B

What is the name of your current employer? Enter "N/A" if not applicable.

C

How many years have you been working for your current employer?
Enter 0 if not applicable.

SECOND PARENT OR GUARDIAN

- If you answered "No" to an additional parent or guardian living in your home on the previous page, you will not see this step. Move to the next page of the guide.

Joshua Banana

1. Basic Information

Legal First Name

Joshua

Legal Last Name

Banana

Email

p-habarzycki@gmail.com

Date of Birth

07/01/1994

Primary Phone Number

7167085219

2. Tax Info

Did Joshua receive a W2 in 2024?

Yes

No

Have you filed, or are you planning to file, your 2024 taxes in the United States?

I've already filed 2024 taxes

2024 US Tax Filing Status

Married Filing Jointly

3. Occupation Details

Current Occupation

Truck Driver

What's the name of the organization that employs Joshua?

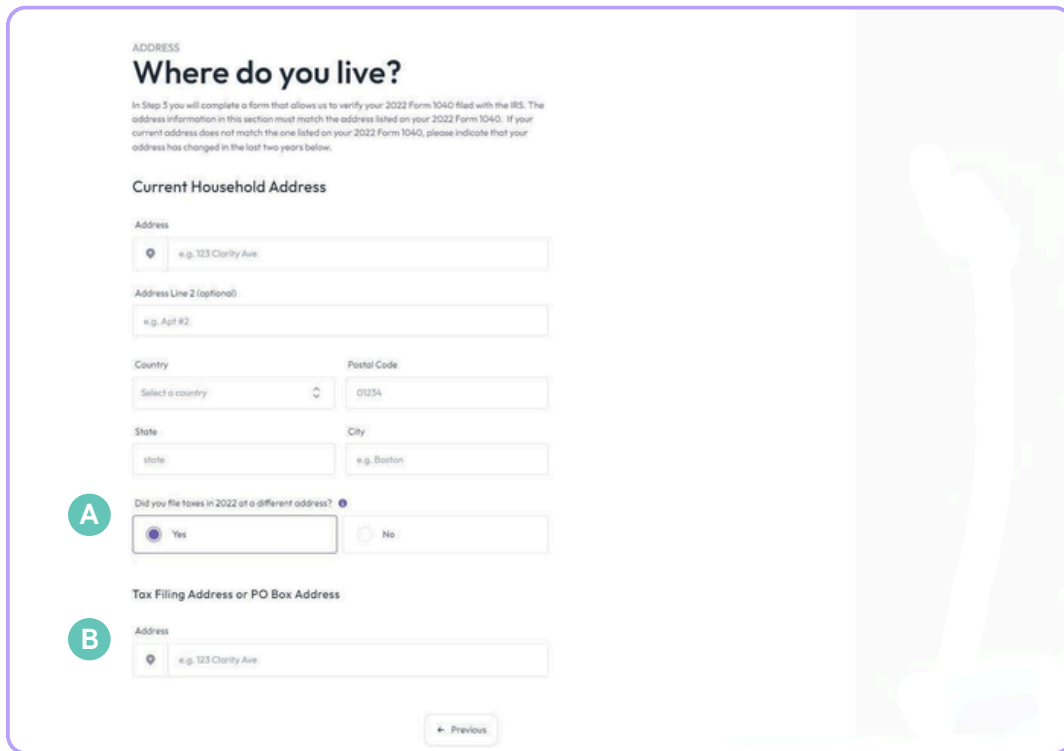
Gernatts

How many years have they been working for their current organization?

8

ADDRESS(ES)

- Later in the application—during Step 4, "Verification"—you will complete a tax verification form that will allow us to verify your most recent Form 1040 filed with the IRS.
- The address information in this section must match the address listed on your most recent Form 1040.
- If your current address does not match the one listed on your most recent Form 1040, please indicate that your address has changed in the last two years in this section.



The screenshot shows a form titled "Where do you live?" with the following fields and sections:

- Current Household Address**
 - Address: e.g. 123 Clarity Ave.
 - Address Line 2 (optional): e.g. Apt #2
 - Country: Select a country (dropdown)
 - Postal Code: 01234
 - State: state (dropdown)
 - City: e.g. Boston
- Did you file taxes in 2022 at a different address?** (Annotation A points to the "Yes" radio button)
- Tax Filing Address or PO Box Address** (Annotation B points to the "Address" field)
 - Address: e.g. 123 Clarity Ave.
- Previous** button

A

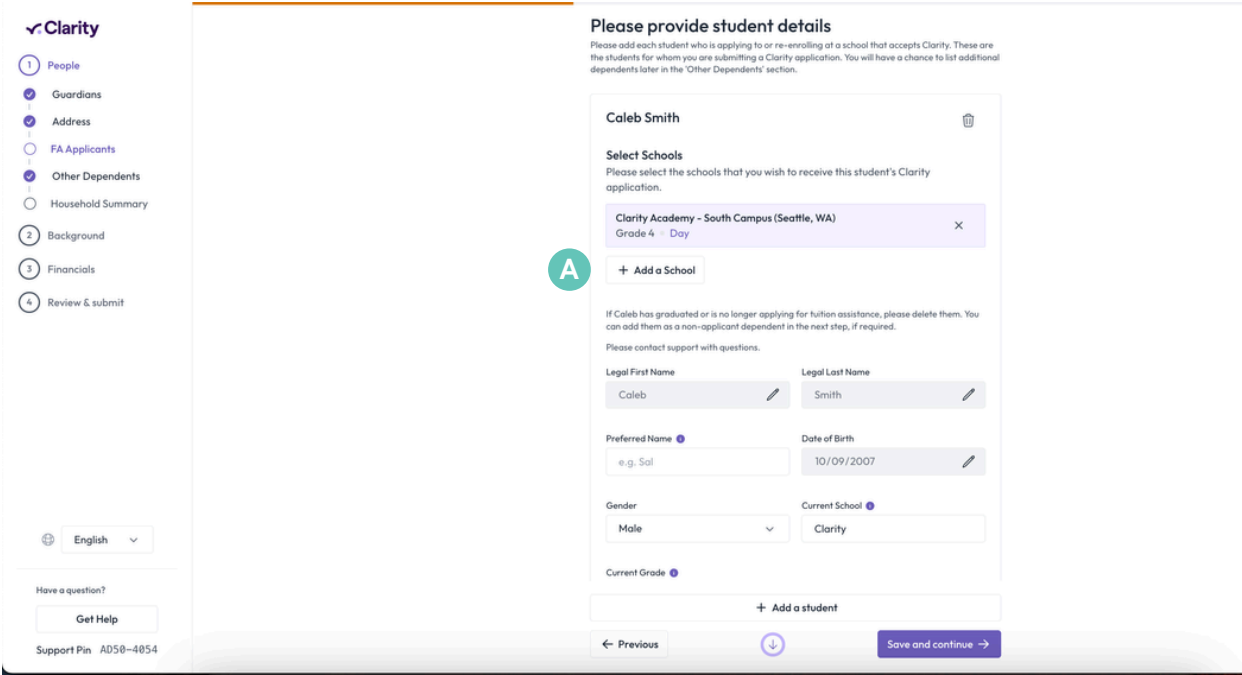
Indicate here if your address has changed in the last two years.

B

Enter the previous address that matches the address listed on your most recent Form 1040.

STUDENT APPLICANTS

- Only list students here who are applying to or re-enrolling at schools who accept Clarity applications.
- You will be able to add additional dependents later in the next section.

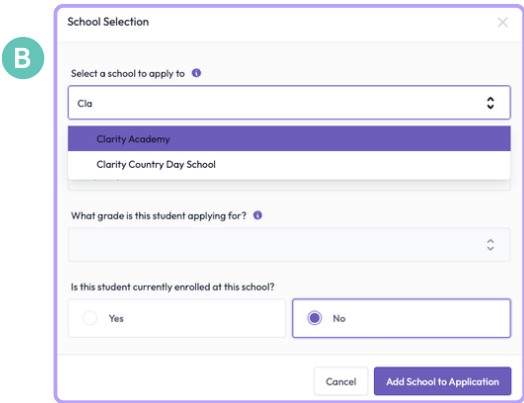


The screenshot shows the 'Please provide student details' section of the Clarity application. On the left is a sidebar with a progress indicator showing steps: 1. People (selected), 2. Background, 3. Financials, 4. Review & submit. Below the sidebar are links for 'Get Help' and 'Support Pin AD58-4854'. The main form area is titled 'Please provide student details' and includes instructions: 'Please add each student who is applying to or re-enrolling at a school that accepts Clarity. These are the students for whom you are submitting a Clarity application. You will have a chance to list additional dependents later in the "Other Dependents" section.' The form contains fields for 'Caleb Smith', 'Select Schools' (with a dropdown showing 'Clarity Academy - South Campus (Seattle, WA)' and 'Grade 4 Day'), 'Add a School' button, 'Legal First Name' (Caleb), 'Legal Last Name' (Smith), 'Preferred Name' (e.g. Sal), 'Date of Birth' (10/09/2007), 'Gender' (Male), 'Current School' (Clarity), and 'Current Grade'. At the bottom are 'Previous', 'Add a student', and 'Save and continue' buttons.

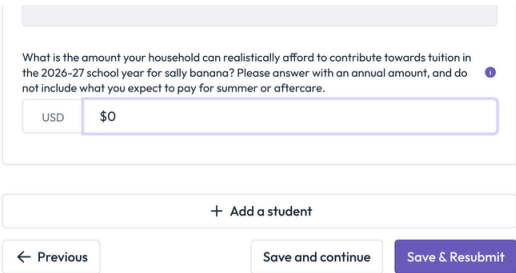
A Add all schools that Student 1 is applying to. Your Clarity application will be sent to each school that you add.

B In the "Add a School" window, start typing the name of the school you wish to add. Or, click the  symbol to scroll through a full list of schools that accept Clarity applications.

C Estimate the amount you can pay for Student 1 next school year.



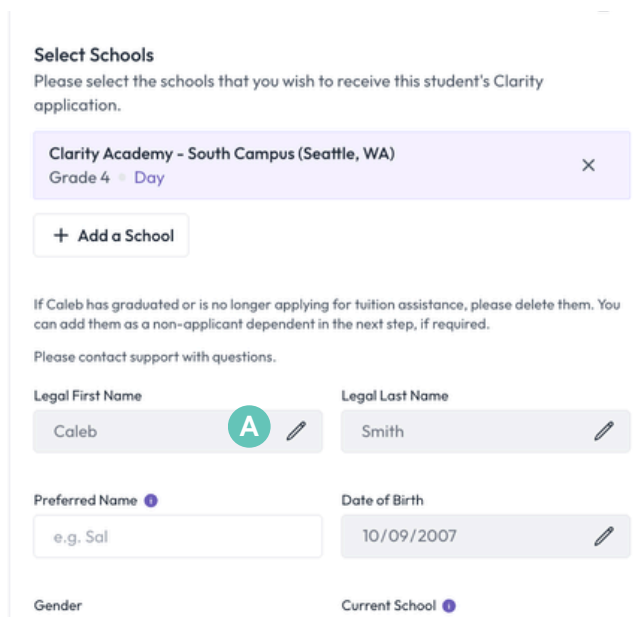
The 'School Selection' modal window shows a search bar with 'Cla' entered, displaying a list of schools: 'Clarity Academy' and 'Clarity Country Day School'. Below the list is a dropdown for 'What grade is this student applying for?'. At the bottom, there are radio buttons for 'Is this student currently enrolled at this school?' with 'Yes' and 'No' options. The 'No' option is selected. At the bottom right are 'Cancel' and 'Add School to Application' buttons.



This section shows a form for estimating the amount a household can contribute towards tuition. It includes a text input field with the question: 'What is the amount your household can realistically afford to contribute towards tuition in the 2026-27 school year for sally banana? Please answer with an annual amount, and do not include what you expect to pay for summer or aftercare.' Below the input field are 'USD' and '\$0' labels. At the bottom are 'Previous', 'Add a student', 'Save and continue', and 'Save & Resubmit' buttons.

EDITING STUDENT APPLICANTS AND OTHER DEPENDENTS

- Be sure all details for your student applicants and other dependents are correct before submitting your application.



Select Schools
Please select the schools that you wish to receive this student's Clarity application.

Clarity Academy - South Campus (Seattle, WA)
Grade 4 • Day

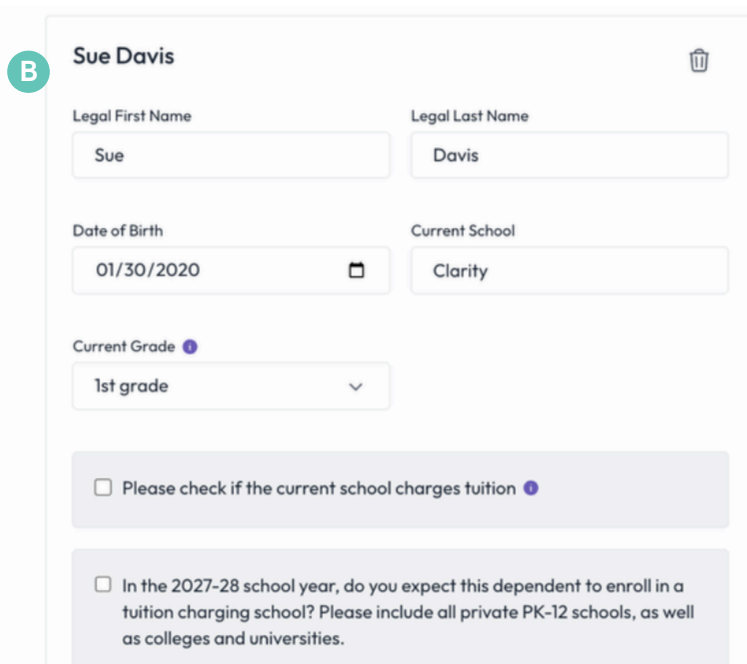
+ Add a School

If Caleb has graduated or is no longer applying for tuition assistance, please delete them. You can add them as a non-applicant dependent in the next step, if required.
Please contact support with questions.

Legal First Name: Caleb
Legal Last Name: Smith
Preferred Name: e.g., Sal
Date of Birth: 10/09/2007
Gender:
Current School:

A

Once you've added one or more students, use the pencil icon next to their name or date of birth to make any edits.



Sue Davis

Legal First Name: Sue
Legal Last Name: Davis
Date of Birth: 01/30/2020
Current School: Clarity
Current Grade: 1st grade

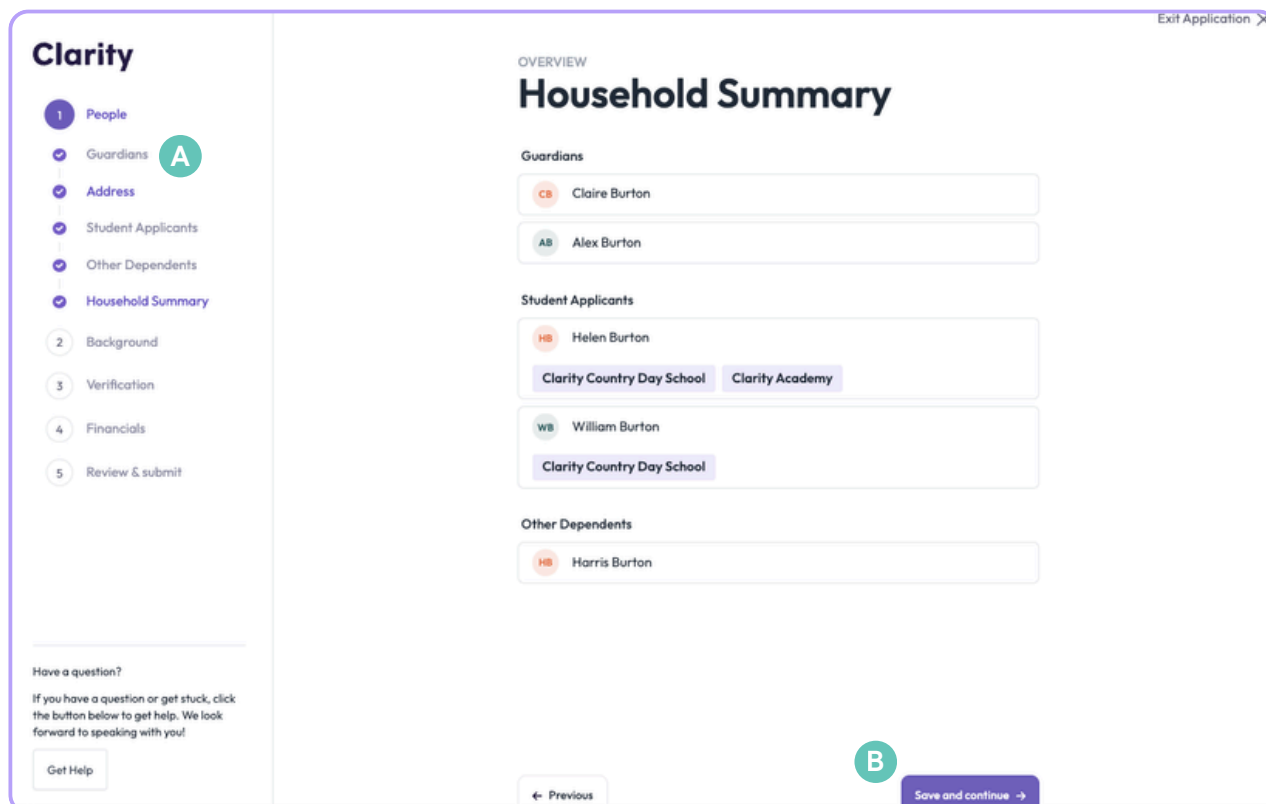
☐ Please check if the current school charges tuition
☐ In the 2027-28 school year, do you expect this dependent to enroll in a tuition charging school? Please include all private PK-12 schools, as well as colleges and universities.

B

Be sure to add all dependents claimed on your most recent tax returns who are not already listed as a parent, guardian or student applicant. Scroll to the bottom of the page to find the "Add Another Dependent" button, if needed.

HOUSEHOLD SUMMARY

- Use this summary step to review the information you've submitted so far.
- Be sure there are no errors or omissions here before proceeding.



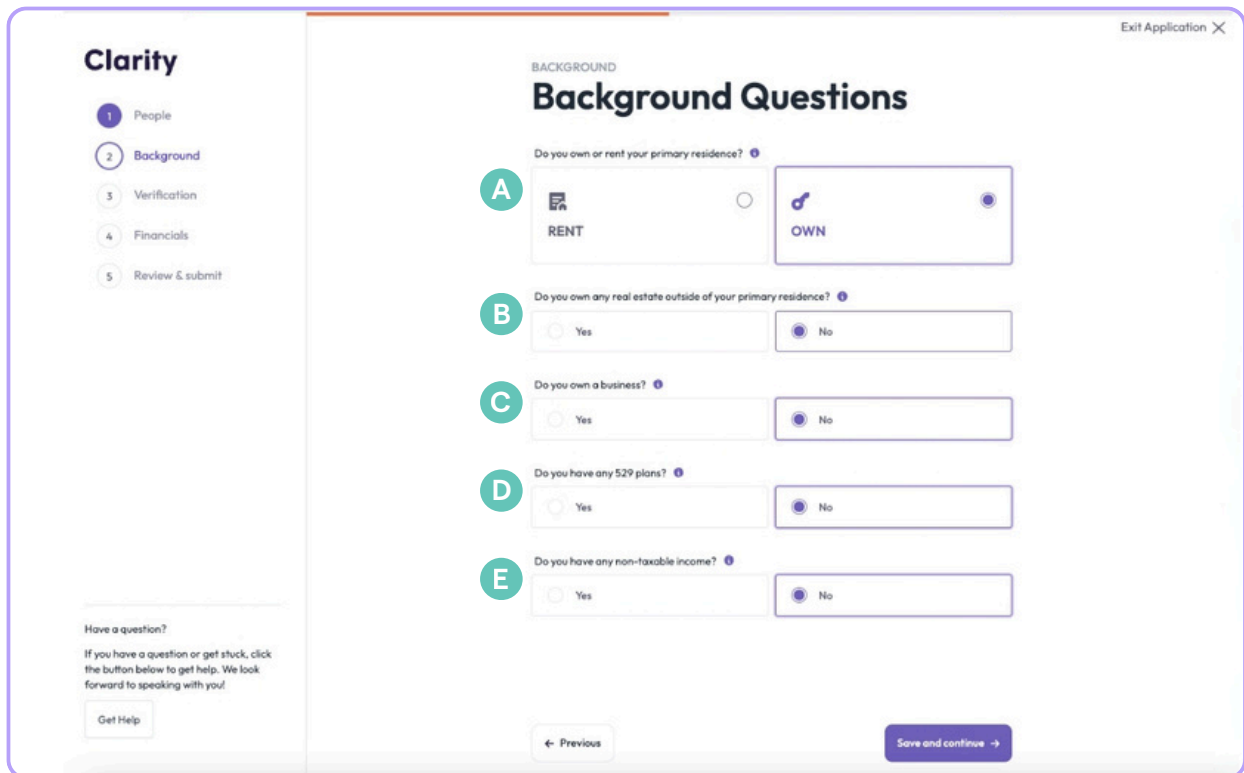
The screenshot shows the 'Household Summary' page in the Clarity application. On the left is a navigation sidebar with a list of steps: 1. People (highlighted with a green circle 'A'), 2. Background, 3. Verification, 4. Financials, and 5. Review & submit. Under step 1, there are sub-items: Guardians, Address, Student Applicants, Other Dependents, and Household Summary (which is the current page). Below the sidebar is a 'Get Help' button. The main content area is titled 'OVERVIEW Household Summary'. It contains three sections: 'Guardians' with two entries (Claire Burton and Alex Burton), 'Student Applicants' with two entries (Helen Burton and William Burton), and 'Other Dependents' with one entry (Harris Burton). At the bottom of the main area are two buttons: 'Previous' and 'Save and continue' (highlighted with a green circle 'B'). A small 'Exit Application' link is in the top right corner.

A Click on the name of any section in the left navigation to jump directly to that section and make changes.

B Be sure to always click "Save and continue" at the bottom of any page after making changes. If you click to jump to a different section without clicking "Save and continue" first, your changes will not be saved.

BACKGROUND QUESTIONS

- The questions on this page will help streamline the application for you. To ensure we're asking questions that are relevant to you and your circumstances, the answers you provide here will impact the questions you see later in the application.



The screenshot shows the Clarity application interface. On the left is a sidebar with a progress indicator showing five steps: 1. People, 2. Background (active), 3. Verification, 4. Financials, and 5. Review & submit. Below the progress indicator is a 'Get Help' button. The main content area is titled 'BACKGROUND' and 'Background Questions'. It contains five questions, each with a lettered label (A-E) in a green circle. Question A asks about primary residence ownership with 'RENT' and 'OWN' radio buttons. Question B asks about real estate outside the primary residence with 'Yes' and 'No' radio buttons. Question C asks about business ownership with 'Yes' and 'No' radio buttons. Question D asks about 529 plans with 'Yes' and 'No' radio buttons. Question E asks about non-taxable income with 'Yes' and 'No' radio buttons. At the bottom are 'Previous' and 'Save and continue' buttons. An 'Exit Application' link is in the top right corner.

A Your "primary" residence is where your family lives for more than 50% of the year.

B Include all real estate, including land, vacation homes, investment properties, etc.

C Answer "yes" if you own 1% or more of any corporation, partnership, LLC or sole proprietorship.

D A 529 plan is a tax-advantaged account that can be used to pay for qualified education costs, including college, K-12, and apprenticeship programs. Answer "yes" if there are any plan(s) your name, your spouse's name, or in any of your dependents' names.

E This includes all income reported as non-taxable on your most recent tax return. Examples include child support and social security.

TAXABLE INCOME

- If your current year taxable income is not finalized, list your best estimate(s).
- You may be required to submit additional documentation for verification.

2026 taxable income for Sally

If your 2026 taxable income is not finalized, list your best estimate. You may be required to submit additional documentation for verification.

2026 Estimated Taxable Income for Sally

Total Salaries and Wages ⓘ

USD

Dividend and Interest Income ⓘ

USD

Self Employment Income ⓘ

USD

Capital Gains ⓘ

USD

Other Taxable Income ⓘ

Add Other Taxable Income +

Do you expect your 2027 income to increase or decrease by more than 10%? If you answer yes, please add a note explaining the change on this page ⓘ

☐ Yes

☒ No / I don't know

A

B

C

D

E

F

A

List each parent or guardian's combined total salaries and wages. Found in box 1 of your W2.

B

List the combined total of any dividends or interest payments received by the end of the current year. Dividend totals are line 2b and Interest totals are line 3b of your 1040.

C

Exclude any amount indicated in the "Total Salaries and Wages" section above. This is line 3 from Schedule 1 of your 1040.

D

This includes any realized capital gains received by the end of the current year. This is line 7 of your 1040.

E

Add any taxable social security, pension and annuities, IRA distributions and anything else listed on schedule 1 of your 1040 here.

F

If you answer "Yes" here, you will be asked to forecast the coming year.

2027/2028

13

NON-TAXABLE INCOME

- If your current year income is not finalized, list your best estimate(s)
- You may be required to submit additional documentation for verification

2026 non-taxable income for Sally

If your 2026 income is not finalized, list your best estimate. You may be required to submit additional documentation for verification.

2026 Estimated Non-Taxable Income for Sally

Child Support

USD

Social Security ⓘ

USD

Other Non-Taxable Income

Include: pre-tax retirement plan contributions, spousal support, disability, clergy/military housing allowance, TANF/SNAP benefits, or inheritance

Add Non-Taxable Income +

A

B

A

Only include the non-taxable component of Social Security income.

B

Include any other non-taxable income sources. Examples include gifts, inheritances, and certain other types of non-taxable benefits.

C

If you like, you can add a note to your application anywhere you see this option.

MONTHLY EXPENSES

- Use the sliders on this page to select an appropriate range for your household.
- If items like retirement contributions or union dues are paid on an annual basis, please divide your gross total by 12.

What are the household's 2026 monthly expenses?

Monthly Rent / Monthly Mortgage Payment (primary home only)

USD

Drag slider to select an amount, if you don't have an expense, select \$0.

Utilities (primary home only) per month

\$0 \$5,000+

Drag to Select

Food and Clothing per month

This includes all monthly grocery, restaurant, and clothing expenses for the household.

\$0 \$5,000+

Drag to Select

Transportation per month

This includes all monthly transportation expenses including vehicle payments, gas, public transportation, rideshares, vehicle insurance, etc.

\$0 \$7,500+

Drag to Select

Health Insurance per month

Please include your pre-tax contributions for medical, dental, and vision coverage. Please enter Out of Pocket Medical Expenses on the next slider.

\$0 \$5,000+

Drag to Select

Out of Pocket Medical Expenses per month

Include average monthly amount paid for deductibles, co-pays, co-insurance, and prescriptions.

\$0 \$5,000+

Drag to Select

Student Loan Payments per month

\$0 \$7,500+

Drag to Select

Post-tax Retirement Contributions per month

Include monthly amount to Roth IRA or other post-tax retirement accounts.

\$0 \$7,500+

Drag to Select

Childcare / Daycare per month

Do not include school tuition or summer camp expenses, which should be entered on the next page as an out of pocket expense.

\$0 \$7,500+

Drag to Select

Eldercare per month

\$0 \$7,500+

Drag to Select

Charitable Contributions per month

\$0 \$7,500+

Drag to Select

Union Dues per month

\$0 \$5,000+

Drag to Select

Child Support per month

\$0 \$7,500+

Drag to Select

Spousal Support / Alimony per month

\$0 \$7,500+

Drag to Select

A

This includes property taxes, and HOA fees.

B

Includes electricity, water, gas, internet, heating oil and phone bills. You may also include sewage, trash, and recycling monthly costs.

C

This includes all monthly grocery, restaurant, and clothing expenses.

D

This includes all monthly transportation expenses including car payments, gas, public transportation, rideshares, etc.

E

Includes monthly actual paid premiums for health, dental and vision insurance policies. Do not include actual out-of-pocket healthcare expenses.

F

Please divide your annual out-of-pocket medical expenses by 12 to provide a monthly amount. Include out-of-pocket paid for deductibles, co-pays, co-insurance, and prescriptions.

G

Includes student loan payments made on behalf of yourself and any dependents.

H

This should include only contributions made to a post-tax account like a Roth IRA. If contributions are made on an annual basis, please divide your gross total contributions by 12.

I

Includes monthly contributions to any daycare services.

J

Includes monthly contributions to any eldercare services.

K

Includes monthly contributions to any 501(c)3.

L

If paid on an annual basis, divide total gross dues by 12.

M

Only include paid child support payments.

N

This includes monthly alimony expenses.

OTHER EXPENSES

- Use this section to list any 2026 expenses that don't fit into the categories on the previous pages.
- Include a brief note explaining each expense.
- Documentation may be requested for any expense listed here.

Did you have any Other Expenses in 2026?

Please list other expenses that you had in 2026 that were not listed in the previous section. Include a note explaining these expenses. You may be asked to provide documentation for any expense listed in this section.

Other Expenses

Add Other Expense +

Other Non-Taxable Income

Include: pre-tax retirement plan contributions, spousal support, disability, clergy/military housing allowance, TANF/SNAP benefits, or inheritance

Add Non-Taxable Income +

Pre-tax retirement contributions

Social security

Disability

Clergy/military allowance

TANF/SNAP benefits

Inheritance

Enter your own

ASSETS - PRIMARY RESIDENCE

- Your "primary" residence is where your family lives for more than 50% of the year.

Clarity

1

People

2

Background

3

Verification

4

Financials

✓

Income

✓

Expenses

○

Assets

○

Liabilities

○

Businesses

5

Review & submit

English

Have a question?

Get Help

PRIMARY RESIDENCE

Tell us about your home

A

What is the address of your primary residence?

Search for your address

What year did you purchase this property?

What is the current market value of this property?

USD

\$250,000

What is the current balance of all mortgages for this property?

USD

\$150,000

What are the annual property taxes for this property?

\$0

What is your annual premium for homeowner's insurance for this property?

\$0

Add a note to this section

← Previous

Save and continue →

A Begin typing your address. Then select your complete address from the dropdown list that appears. If your address does not appear in the dropdown, type your complete address in the box and then click on the next box on the page to continue filling out the application.

ASSETS - OTHER REAL ESTATE

- In this section, please include the information pertaining to any additional real estate which you own in full or in part. Examples include: rental properties, vacation homes, etc.

Clarity

1

 People

2

 Background

3

 Verification

4

 Financials

Income

Expenses

Assets

Liabilities

Businesses

5

 Review & submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

OTHER REAL ESTATE

Tell us about your other properties

A

Other Real Estate 1

What is the address of this property?

111 1st Ave NE, Seattle, WA 98115, USA

When did you purchase this property?

2000

What is the purpose of this property?

Rental Property

What is the current market value of this property?

USD 250000

What is the current balance of all mortgages for this property?

USD 150000

+ Add Another Property

Remove Other Real Estate

Add a note to this section +

Previous

Save and confirm ->

A If you add two or more properties in this section, use the dropdown list at the top of the page to toggle between entries.

ASSETS - VEHICLES

- In this section, please indicate the information regarding monthly expenses for all vehicles you own or lease and include the value/payment information for those vehicles.

Clarity

1

People

2

Background

3

Verification

4

Financials

5

Income

6

Expenses

7

Assets

8

Liabilities

9

Businesses

10

Review & submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

VEHICLES

Vehicles

Vehicle 2

Vehicle 1

Vehicle 2

OWN

LEASE

Make of Vehicle

Honda

Model of Vehicle

Pathfinder

Year of Vehicle

2018

Monthly Financing Expense

USD ex. \$300

Add Another Vehicle +

Remove Vehicle

Add a note to this section +

Previous

Save and continue ->

A If you add two or more vehicles in this section, use the dropdown list at the top of the page to toggle between entries.

OTHER ASSETS

- In this section, please include information for the total monetary value of all additional assets not previously accounted for in the application.

The screenshot shows the 'Other Assets' form within the Clarity application. The left sidebar contains a navigation menu with steps: 1 People, 2 Background, 3 Verification, 4 Financials (selected), and 5 Review & submit. Under 'Financials', there are sub-items: Income, Expenses, Assets (selected), Liabilities, and Businesses. The main content area is titled 'ASSETS Other Assets'. It features four sections: 'Bank Accounts' with a text input field labeled 'A' and 'USD'; 'Brokerage Accounts' with a text input field labeled 'B' and 'USD'; 'Retirement Accounts' with a text input field labeled 'C' and 'USD'; and 'Other Assets' with a text input field labeled 'D' and a button 'Add Another Asset +'. At the bottom, there is a 'Get Help' button, a 'Previous' button, and a 'Save and continue' button. A 'Have a question?' section is also present at the bottom left.

A Enter the total average monthly balance for all accounts over the past 12 months.

B Includes all money invested, excluding retirement accounts.

C Enter the total value of all retirement accounts.

D Itemize all remaining assets not listed elsewhere on this application. Examples include trusts and annuities.

ASSETS - 529 PLANS

- A 529 plan is a tax-advantaged account that can be used to pay for qualified education costs, including college, K-12, and apprenticeship programs.
- If your 529 is not in the name of specific dependents, please divide the total amount evenly across all dependents.

Clarity

1

 People

2

 Background

3

 Verification

4

 Financials

Income

Expenses

Assets

Liabilities

Businesses

5

 Review & submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

ASSETS

529 Plan Amounts

Enter the total dollar amount of 529 plans itemized by dependent. If your 529 is not in the name of specific dependents, please divide the total amount evenly across all dependents.

Helen Burton

USD5,000

William Burton

USD5,000

Add a note to this section +

Previous

Save and continue →

Exit Application X

LIABILITIES

- In this section, please include the monthly payment amounts for all current outstanding debts for your household.

A

Enter your total outstanding credit card debt.

B

List the total amount of outstanding loans in your or your spouse's name(s). Additionally, please list the total amount of outstanding loans in your dependents' names if you made or intend to make payments on their behalf in the current year.

C

List the total outstanding amount owed for any healthcare related expenses.

D

List all other outstanding debts using the "Add Another Debt" button.

BUSINESSES

- List all businesses where you own 1% or more of any corporation, partnership, LLC or sole proprietorship.

Clarity

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Income

Expenses

Assets

Liabilities

Businesses

5 Review & submit

English

Have a question?

Get Help

BUSINESSES

Businesses

A

Business 1

Business Name

ex. Microsoft

What year was it started?

1990

Type

Select an option

What % do you own?

2022 Gross Profit

B

USD

2022 Net Income

C

USD

Value of Business Assets

D

USD

Total Liabilities

E

USD

Is this business still operating?

Yes

No

Description

Please describe the nature and type of this business.

0 of 5000

Previous

Save and continue

A

If you add two or more businesses in this section, use the dropdown list at the top of the page to toggle between entries.

B

Gross profit/gross income is the revenue earned before taxes and other deductions. Make sure this is consistent with your corresponding tax returns.

C

Net Income/net profit is the profit left after deducting total business expenses from your gross income. Make sure this is consistent with your corresponding tax returns.

D

If you have completed a financing or 409a within the last two years, please use that valuation. Otherwise, please estimate.

E

Liabilities are debts or any other obligations in which your business owes money currently or in the future.

Net Income

Miscellaneous Income - Form 1099 - Line 7
Business Schedule C - Line 31
Business Schedule C-EZ - Line 3
Farm - Schedule F - Line 34
Estates and Trusts - Form 1041 - Line 22

Partnership - Form 1065 - Line 22
Corporation (short form) - Form 1120A - Line 26
C Corporation - Form 1120 - Line 30
S Corporation - Form 1120S - Line 21

OTHER CONSIDERATIONS

- Please list outside sources such as friends, family, or grants that will be contributing to your tuition payments.
- Please include any additional information that may be important to share with the schools to which you are applying

Clarity

1

People

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Review & submit

Other considerations

School questions

Payments

Submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

OTHER

Other considerations

Are there any other sources that you expect to contribute towards your educational expenses in 2022?

Please list any other sources such as relatives, friends, or third party scholarships that you expect to contribute towards your 2023-24 school year educational expenses.

Is there any additional information that you would like to have considered?

Additional information

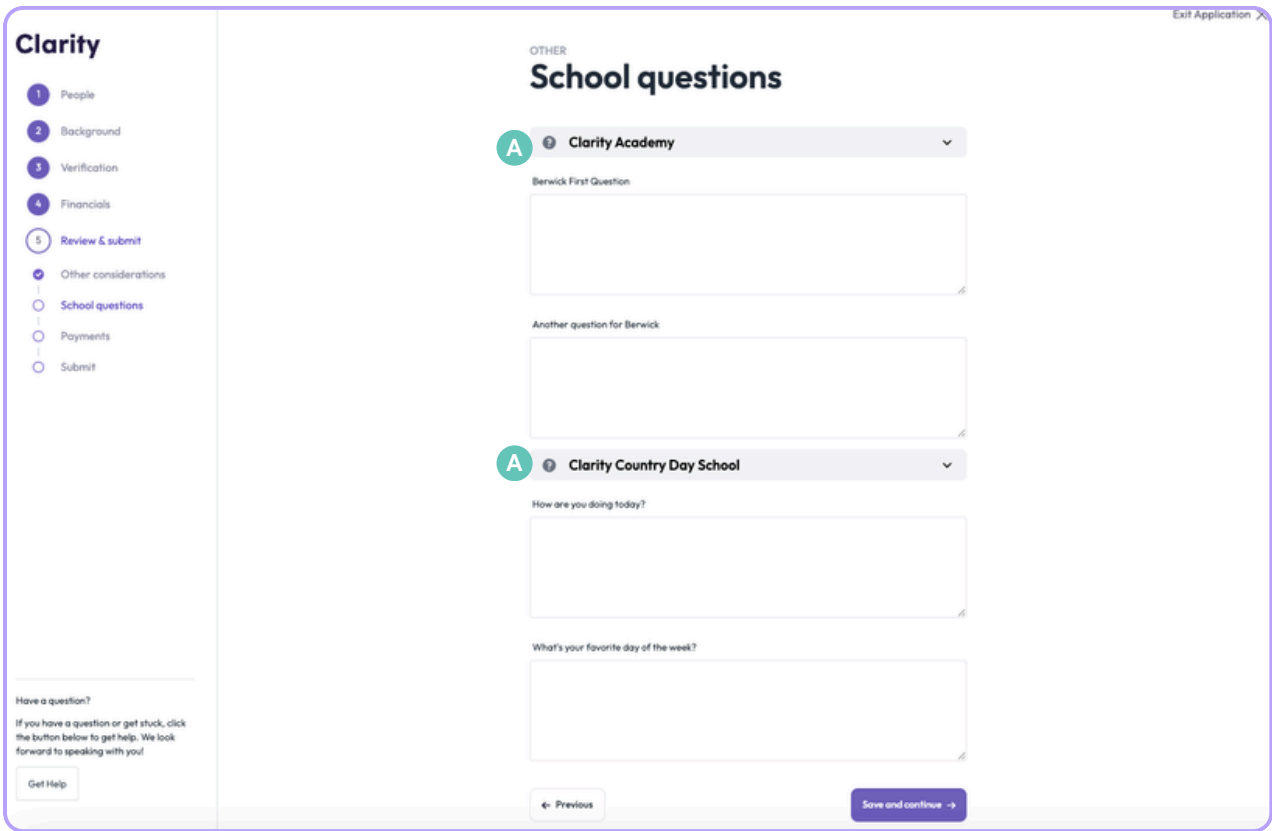
← Previous

Save and continue →

Exit Application

SCHOOL QUESTIONS

- Sometimes, individual schools have additional questions for their applying families.
- If you see questions on this page, that means a school you're applying to would like you to answer their additional question(s).
- The school name labels indicate which school is asking the additional question.



Header indicates which questions come from which schools.

ENHANCED TAX VERIFICATION

- Clarity uses best-in-class security to safeguard the information you share with us while making the application process intuitive and efficient for families. You will be prompted to select how you authorize Clarity to access your taxes from the IRS.
- If you select the Clarity method, you will sign some tax authorization forms and do a quick identity verification.
- If you select the IRS method, you will need to make sure all guardians on the application have an account with irs.gov. If you don't already, you will need to create one first.

* NOTE: For families that went through the Clarity method last year, you will likely not need to repeat the process at all, as you authorized us to pull your taxes in future instance of applying.

Verify Taxes to Submit Application

[Close applic](#)[Why is this required?](#) [How does Clarity protect my data?](#)

Choose how you want to securely share taxes with school(s)

This step is required to complete your application.

☒  Clarity Recommended	☐  IRS
--	--

In order to understand a family's complete financial picture, schools require families to submit tax transcript(s) to verify income and financial information. In this section, you will be asked to e-sign a Form 8821 document. This document authorizes Clarity to securely pull your year 2025 tax transcripts from the IRS. We will not request your tax transcripts until you complete and submit your application. We will only share them with the school(s) to which you are applying.

Please ensure your name, address, and SSN/TIN are correct. Your name, address, and social security number or tax identification number should be entered exactly as they appear on your 2025 tax return. Incorrect information could prevent the IRS from sharing your transcripts, which will delay the processing of your application.

Finally, the IRS requires identity verification to help protect you and your tax information. Once your identity is verified, we won't ask you to verify it again in future years. If you have any questions or need assistance, please feel free to contact us [here](#).

[How does Clarity protect my data?](#)

 Adam Meredith has not completed verification

[Begin verification](#)[Having trouble? Contact Support](#)

If you have any questions around the tax verification process, please refer to the Tax Verification Family Guide found in our help center.

PAYMENT

- The fee to submit your Clarity application is \$65.
- The fee is a flat fee, meaning that it does not change whether you apply for one or multiple children, and to one or multiple schools.



1

People

2

Background

3

Financials

4

Review & submit

✓

Other Considerations

✓

School Questions

✓

Review

○

Payment

○

Verification

Payment

Please enter a credit or debit card to pay the \$65 fee and submit your application. This one fee covers sending your application to any number of schools that accept the Clarity application this year. The fee is non-refundable once you've submitted your application.

Have a code?

Card number

1234 1234 1234 1234



Expiration date

MM / YY

Security code

CVC

123

Country

United States

ZIP code

12345

A

Contact the school(s) you are applying to if you need a code to waive the application fee.

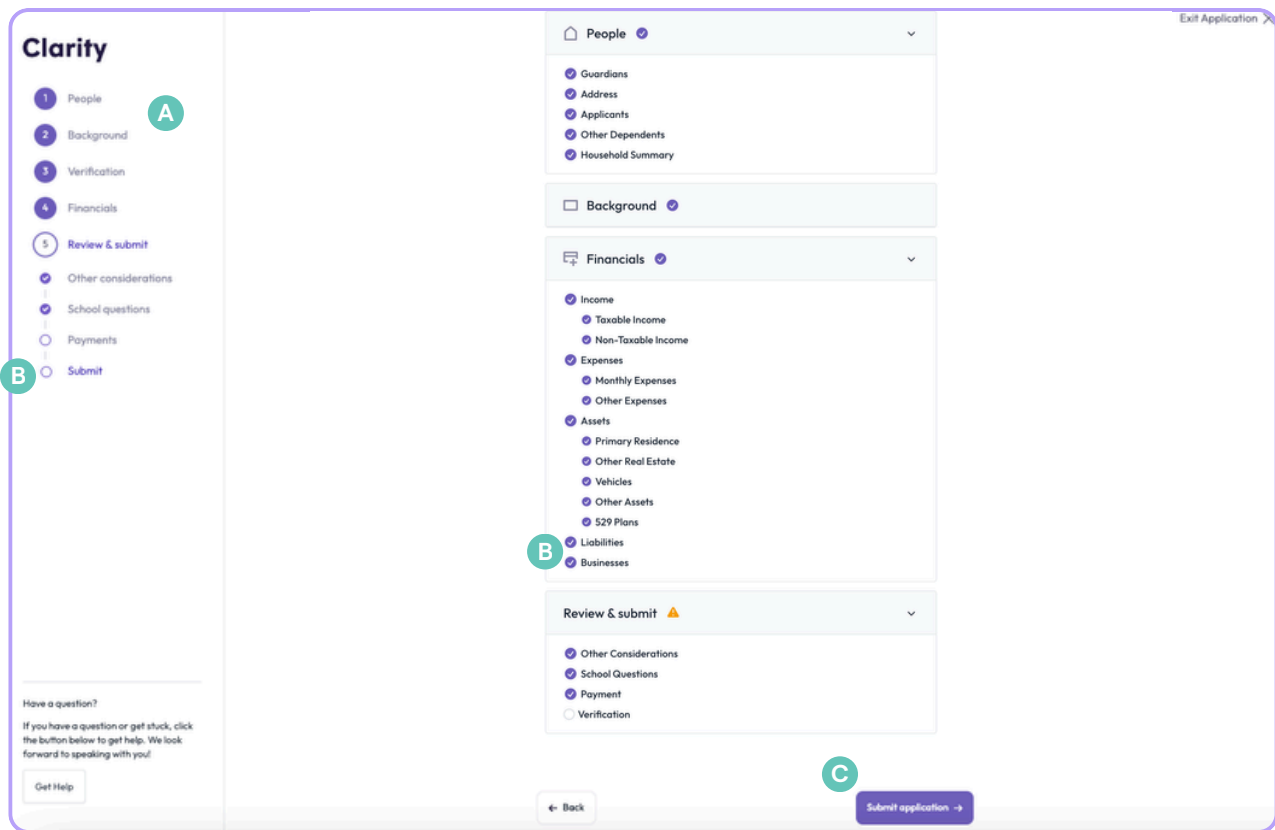
2027/2028

27

Step 4: Review & Submit

SUBMIT APPLICATION

- Use this page to review your entire application.
- Use the left navigation to jump to any part of the application that you would like to review or make changes to before submitting.
- Once you submit your application, copies will be sent to the schools to which you are applying. You will not be able to make changes to your tax filing status, indication of if you do or do not receive a United States W2 and information entered on the IRS tax verification form. Make sure you have accurate social security number(s) and exact address used for filing of your 2025 taxes to avoid errors and delays.

The screenshot displays the Clarity application interface. On the left is a navigation menu with a list of sections: 1 People, 2 Background, 3 Verification, 4 Financials, 5 Review & submit, Other considerations, School questions, Payments, and Submit. The 'Review & submit' section is highlighted with a green circle 'A'. The main content area shows the 'Review & submit' section with a list of items: Other Considerations, School Questions, Payment, and Verification. A 'Submit application' button is at the bottom right, highlighted with a green circle 'C'. A 'Back' button is at the bottom left. A green circle 'B' is placed over the 'Review & submit' section header. The interface also includes a 'Have a question?' section at the bottom left and an 'Exit Application' link at the top right.

A

Click on the name of any section in the left navigation to jump directly to that section and make changes.

C

Be sure to always click "Save and continue" at the bottom of any page after making changes. If you click to jump to a different section without clicking "Save and continue" first, your changes will not be saved.

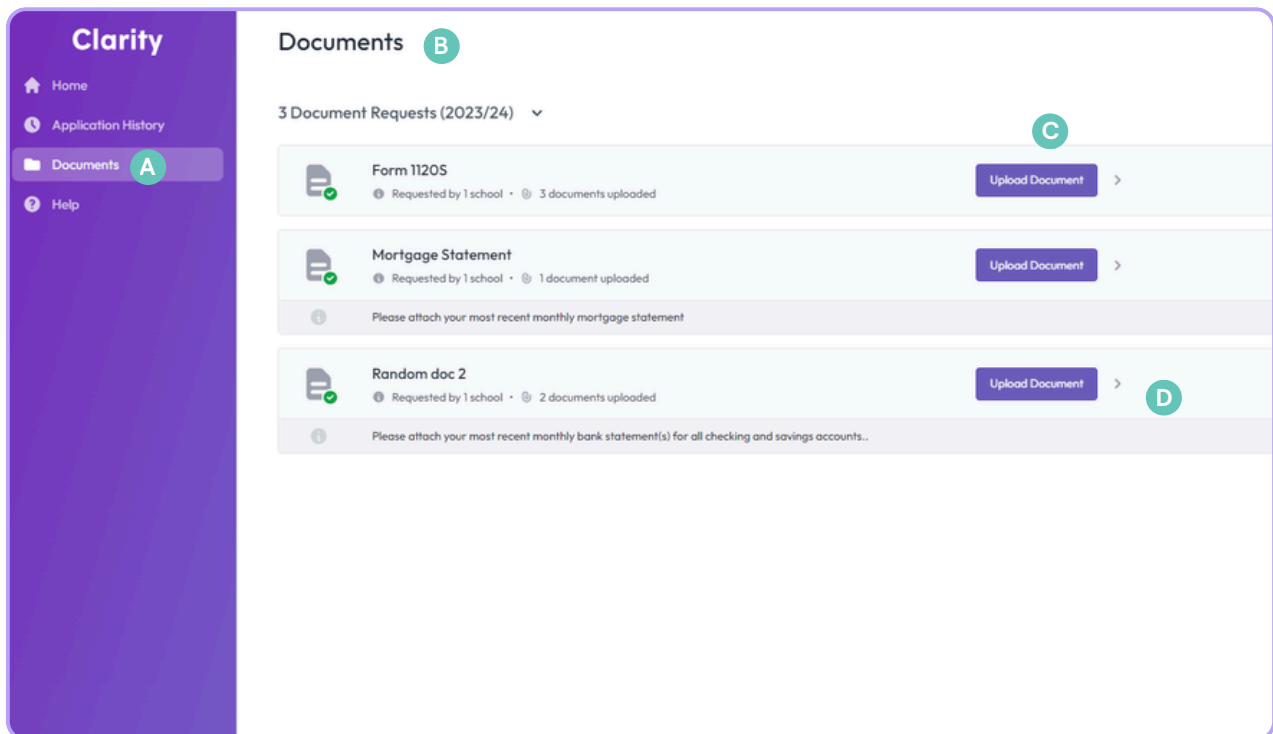
B

A filled-in purple bubble containing a checkmark means that the corresponding section is complete. An empty bubble indicates that a section is incomplete. You will need to navigate to any incomplete sections and fill in missing information before you can submit your application.

Step 5: Documentation Requests

UPLOAD ADDITIONAL DOCUMENTS

- Once your application has been submitted, you may receive requests to upload additional documents for schools.
- From your main homepage, you will be able to upload these files under the Documents section of your portal.
- If any document requests are not applicable, please reach out to the school directly and let them know.



A Click on Documents in your left menu.

B The Documents page will show documentation requests for all schools.

C Click on the "upload document" button to choose a file to upload.

D Click on the arrow to view all uploaded files and/or to delete any uploads.

Step 6: Financial Aid Notification

HEARING BACK FROM SCHOOL(S)

- Once your application is complete and you've uploaded all requested documents, schools will begin the process of reviewing your application.
- You will hear back directly from schools regarding your financial aid decision.

FREQUENTLY ASKED QUESTIONS

✓ **What is a W2?**

A W2 is a wage and tax statement that you should receive from your employer that defines the income you earned, taxes that were withheld and benefits you paid into and/or were provided from your employer.

✓ **Where do I get an access code?**

Please check the school's website or check with their financial aid office directly if an access code is needed to add them to your application.

✓ **Can I add another school to my application later?**

Yes, you can add another school to your application after initial submission under Step 1 Student Applicants.

✓ **What is the status of my application?**

You can find the current status of your application on your main homepage. If it says "submitted" and you've fulfilled all documents being requested, you should be set. If you have any questions about your status, please check with the school's financial aid office directly for any updates.

✓ **What is a Form 1040?**

A Form 1040 is what individual taxpayers use to file their taxes with the IRS.

✓ **Where do I get a fee waiver?**

Please check with the school's financial aid office directly. Clarity does not provide these directly.

✓ **I don't have a specific document to upload that is being requested. What should I do?**

Please reach out to the school's financial aid office directly.

✓ **Can I get a refund?**

Clarity's application policy is non refundable and the only exceptions that can be made is if the school is requesting this directly.

✓ **What if the IRS rejects my tax verification form?**

Please refer to the email you will receive from Clarity that will outline which tax documents we will need your household to manually upload.