



APPLY FOR FINANCIAL AID 2020-2021 SCHOOL YEAR

THE HALO INITIATIVE

The HALO Initiative supports Catholic Schools in the Diocese of Dallas in getting students to college & heaven by coordinating the distribution of need-based tuition assistance to students in diocesan schools. We believe that Catholic education changes lives & improves communities, and that a family's ability to pay should not limit their access to a better life through one of our Catholic Schools.

When you apply for tuition assistance through FACTS, you're applying for both tuition assistance from HALO and from your school.

ELIGIBILITY

To be eligible to receive tuition assistance, a family/student must:

- Complete an application through FACTS Grant & Aid (must re-apply annually)
- Demonstrate financial need
- Meet the school's entrance requirements
- Be current with all financial obligations due to any Catholic school within the diocese

Financial aid is awarded without regard for race, religion, gender, or ethnic origin.

TIMELINE

PRIORITY APPLICATION ROUND: November 1, 2019 – January 5, 2020

- Open to families currently enrolled in a Catholic school for the 2019-2020 school year
- Families will be notified by their school of award decisions in February 2020

REGULAR APPLICATION ROUND: January 6, 2020 – April 1, 2020

- Open to current families & families new to Catholic education
- Families will be notified by their school of award decisions in May 2020

HOW TO APPLY

- 1) Use your school's unique FACTS link or visit www.online.factsmgt.com to create an account or log in
- 2) Complete your family application & pay the \$35 application fee
- 3) Upload required supporting tax documents by scanning them or taking a photograph (see page 2 for list of documents)

Your school can assist you in completing your application! Contact them to learn about making an appointment.

Filling out your application carefully ensures that it will be complete and on time.

REQUIRED SUPPORTING DOCUMENTATION

To complete your FACTS application, you will be required to submit the following documents:

- Copy of 2018* or 2019 IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return. If applicant and co-applicant file separately, we require both tax returns for the same tax year.

**some schools require the 2019 tax return for families applying for school financial aid*

- Copies of all 2019* W-2 Wage and Tax Statements for both the applicant and co-applicant. NOTE: If you are applying before you have received all the 2019 W-2 Wage and Tax Statements, please submit them as soon as they become available.

**Apply during the Priority Round (on/before January 5) to be eligible to use 2018 W-2 Wage & Tax Statements*

- Copies of all supporting tax schedules if you have income from any of the following:
 - BUSINESS – (Form 1040 Line 12) Attach Schedule C or C-EZ and Form 4562 Depreciation and Amortization
 - FARM – (Form 1040 Line 18) Attach Schedule F and Form 4562 Depreciation and Amortization
 - RENTAL PROPERTY – (Form 1040 Line 17) Attach Schedule E (page 1)
 - S-CORPORATION – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1120S (4 pages), Schedule K-1 and Form 8825
 - PARTNERSHIP – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
 - ESTATES AND TRUSTS – (Form 1040 Line 17) Attach Schedule E (page 2), Form 1041 and Schedule K-1

- If you do not file income taxes and are unable to furnish a tax return or other tax schedules, you must provide copies of supporting documentation for Taxable Income, such as a letter from your employer.

- Copies of all supporting documentation for household Non-Taxable Income including: Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF).

NOTE: You *must* provide documentation to verify the source of any wages/income listed on your application. Applications that do not include this supporting information are incomplete and will not be considered for tuition assistance.

Please allow approximately 2 to 3 business days for FACTS to verify receipt of documents, and up to two weeks for your application & supporting documents to be fully processed.

If you have questions about your application status, please contact your school.