FACTS Management makes quality education affordable for families by assisting schools in awarding financial aid. We work with schools to create a custom application and collect financial data so schools can make accurate award decisions based on financial need.

After completing the online application, you will need to upload or fax all required supporting documentation. Uploaded documents must be in PDF format and the size of each document must be less than 20 MB. If you are unable to upload, fax the required documents to 866.315.9264. Please **DO NOT** use your mobile device to photo copy required documents due to problems with legibility.

The following supporting documents are <u>required</u> to complete the application process:

- Copy of the most recent **IRS Federal Form 1040, 1040A or 1040-EZ U.S. Individual Income Tax Return** (the year of the tax return depends on the tax requirements of the school). If applicant and co-applicant file separately, we require both tax returns for the <u>same tax year.</u> We do not require State Tax Returns.

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

- Copies of all supporting tax documents if you have business income/loss from any of the following:
  Business - send Schedule C or C-EZ and Form 4562 Depreciation and Amortization
  Farm - send Schedule F and Form 4562 Depreciation and Amortization
  Rental Property - send Schedule E (page 1)
  S-Corporation - send Schedule E (page 2), Form 1120S (5 pages), Schedule K-1 and Form 8825
  Partnership - send Schedule E (page 2), Form 1065 (5 pages), Schedule K-1 and Form 8825
  Estates and Trusts - send Schedule E (page 2), Form 1041 and Schedule K-1

*IMPORTANT: If you file a tax return but do not have W-2 wages because you are self-employed, you will be required to submit a copy of your current year Federal Form 1040 Tax Return.

- Copies of all supporting documentation for **household <u>Non-Taxable Income</u>** such as:
  Social Security Income, Welfare, Child Support, Food Stamps, Workers' Compensation, and Temporary Assistance for Needy Families (TANF). If you do not file a tax return, you are <u>required</u> to provide documentation of all income received.

*All documentation received is imaged upon receipt and then destroyed.

You may login to your FACTS user account to review the status of your application. **Please allow 2 weeks processing time from the date you provided the supporting documents before inquiring further about receipt and/or status of the uploaded or faxed documents.** Application deadlines are set by the institution awarding the scholarships. If you are applying after the deadline, please contact your school to ensure that your application will be accepted.

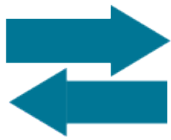*A non-refundable application fee may be required before your application will be submitted.

NOTE: Award decisions are made by the institution providing the scholarship, not FACTS.

FACTS
A **nelnet** COMPANY

We know your time is valuable. That's why we offer a quicker, easier, and more secure way to apply for financial aid than filling out a paper application form. Visit online.factsmgt.com/aid to submit your application in the safest, most convenient way possible.

Applying online is:

Fast

- Submitting online eliminates application processing time so your awarding organization sees your application two weeks sooner than if you were to submit a paper application.

- The online progress tracker and checklist guide you through completion and notify you instantly when all required documentation and information has been submitted.

- The organization you are applying to sees your application immediately upon submission and can take action on it sooner.

Convenient

- There are more payment options available online for the application fee, including ACH (checking or savings account) and credit or debit card.

- In addition to our call center support, applying online offers live chat support and one-click Spanish translation.

- Applying online helps the environment by reducing paper waste.

Secure

- Eliminate the risks associated with mailing sensitive personal and financial information.
- Applying online ensures your personal information, such as SSN and bank account number, is stored securely at all times.

Our online application is available 24/7. Apply today at online.factsmgt.com/aid.

PCI DSS Level 1 **VALIDATED**

SSAE 16 **AUDITED**