FINANCIAL AID CHECKLIST

Step 1: The Online Admission Application

☐ Indicate that you are applying for financial aid on Step 1 of the Harvard-Westlake online admission application. The application fee is automatically waived for families applying for financial aid from the school.

Step 2: Parents' Financial Statement

☐ Starting on October 2, 2019, visit the School and Student Services (SSS) website – sss.nais.org – and begin your financial aid application.

☐ Complete a Parents' Financial Statement (PFS) using your family's estimated 2019 and 2020 financial information. The PFS does not need to be exact, but it does need to be as accurate an estimate of your income and current assets as you can make now.

☐ If necessary, include information about extenuating circumstances regarding your finances in the Other Considerations section of the PFS.

☐ List Harvard-Westlake as a school that should receive a copy of the results (HW code 3736).

☐ Pay and submit the PFS. Fee waivers are automatically issued to families who meet SSS income requirements.

Step 3: Required Tax Documents

☐ Upload the following required tax documents directly to the SSS website. All documents must be non-password protected.

☐ 2018 Federal Tax Return

☐ Form 1040 and all supporting Schedules

☐ 2018 W-2 and/or Form 1099

☐ Business owners with an S-Corp and/or Partnership listed on a Schedule E must upload the corresponding K-1s and Forms 1065 and/or 1120S.

Step 4: Application & Supporting Materials Deadline

☐ Please ensure that the PFS and all required tax documents are submitted by January 17, 2020, at 11:59 p.m. PST.