



**FACTS**  
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## Grant & Aid Assessment

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.

To apply for financial aid, visit [online.factsmgt.com/aid](http://online.factsmgt.com/aid)

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 required 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 same tax year. We do not require State Tax Returns.
- Copies of **all 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 Non-Taxable Income** 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 required to provide documentation of all income received.

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

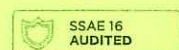
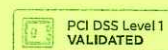
You may login to your FACTS user account to review the status of your application. **Please allow 2 weeks processing time from the date you provided the supporting documents before inquiring further about receipt and/or status of the uploaded or faxed documents.** Application deadlines are set by the 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.**

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For more information, visit [FACTSmgt.com/grant-and-aid](http://FACTSmgt.com/grant-and-aid)





**FACTS**  
A FINANCIAL COMPANY

## Tuition Management

**FACTS provides flexible payment plan options to families at private and faith-based schools. Families can budget their tuition, making private school more accessible and affordable. Our process is simple, convenient, and secure.**

**To set up your payment plan, visit the school's website and click on the FACTS link.**

[www.saintkaterischool.org](http://www.saintkaterischool.org)

### FACTS Confirmation Notice

Once your information is received and processed by FACTS, you will receive a FACTS Confirmation Notice. This notice will confirm your payment plan information. Please check this information for accuracy, and contact your school or FACTS with any discrepancies.

### Frequently Asked Questions

- **Is my information secure?**  
Yes. Your personal information, including payment information, is protected with the highest security standards in the industry. For more information on security, visit [FACTSmgmt.com](http://FACTSmgmt.com).
- **When will my payments be due?**  
Your payment schedule is set by your school, and your financial institution will decide the time of day your payments are processed.
- **What happens when my payment falls on a weekend or a holiday?**  
Your payment will be processed on the next business day.
- **What happens if a payment is returned?**  
Returned payments may be subject to a FACTS Returned Payment Fee; watch for a returned payment notice for additional information.
- **How do I make changes once my agreement is on the FACTS system?**  
Changes to your address, phone number, email address, or banking information can be made at <https://online.factsmgt.com> or by contacting your school or FACTS. Any changes to payment dates or amounts need to be approved by the school and the school will then need to notify FACTS.  
**All changes must be received by FACTS at least two (2) business days prior to the automatic payment date in order to affect the upcoming payment.**
- **What is the cost to set up a payment plan?**  
If an enrollment fee is due, the amount of the fee is indicated when setting up your agreement. If applicable, the nonrefundable FACTS enrollment fee will be automatically processed within 14 days of the agreement being posted to the FACTS system.

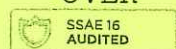
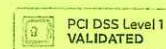
**FACTS Customer Service**

**St. Kateri Finance Office - 585-544-8889**  
**Annette Syracuse ex. 2108**

We are committed to doing all we can to provide you with the highest quality customer service in the industry. Whether you want to view your account online or speak with one of our highly trained customer service representatives, FACTS is dedicated to serving you.

**To view your payment plan details, login to your FACTS account at [online.factsmgt.com](http://online.factsmgt.com). Customer Care Representatives are also available to assist you 24/7.**

For more information, visit [FACTSmgmt.com/payment-plans](http://FACTSmgmt.com/payment-plans)



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