



FACTS
A nelnet COMPANY

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.

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.

For more information, visit FACTSmgt.com/grant-and-aid





FACTS Grant & Aid Assessment

FACTS Management, a division of Nelnet, Inc., makes quality education affordable for families and students, while supporting the financial stability of private and faith-based institutions.

One way we do this is through our Grant & Aid Assessment service, which allows schools to award financial aid with confidence to the families who truly need it. We work with schools to create a custom application for families, so FACTS can collect the financial data that matters. This way, your school will have the most accurate picture possible to make award decisions it can be proud of.

You can apply at your school's website, or by visiting FACTS at: online.factsmgmt.com/aid

- If you use FACTS Tuition Management, you may log in using the same credentials
- Fill out and submit your online application*
- Submit all required supporting documents by uploading online or faxing to 866.315.9264

Customer Care Representatives are available to assist you at 866.441.4637.

Frequently Asked Questions

Q. Who sets the application deadlines?

A. Application deadlines are set by your institution. If you are applying after the deadline, please contact your school to make sure your application will be accepted.

Q. Is the application process secure?

A. Yes. All documentation received is imaged upon receipt and then destroyed. Then, the application data becomes property of the applicable institution.

Q. What happens after I apply?

A. You can log into online.factsmgmt.com to check the status of your application. Please allow two weeks for processing.

Q. Does the FACTS Grant & Aid Assessment process require a credit check?

A. No. FACTS does not require a credit check!

Apply at your school's website,
or for more information visit FACTSmgmt.com/grant-and-aid

FACTSmgmt.com



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