

Jefferies Family Scholarship

Instructions for completing the financial need component of the JFS application

The Jefferies Family Scholarship Program partners with School and Student Services (SSS) by NAIS in our financial need assessment process. To complete the Jefferies Family Scholarship application for your son or daughter, you will need to complete SSS's Parents' Financial Statement (PFS). The PFS is a comprehensive application that takes time to complete, so give yourself the time you need by not waiting until the deadline to begin. You will also need some tax documents in hand before beginning the PFS, and you may want to review the helpful materials that SSS has put together at sssbynais.org/parents. **Please read this entire document, which contains important information at the bottom of the page.**

The Jefferies Family Scholarship Selection Committee will use information from the PFS to determine the relative degree of financial need of each applicant. Financial need is heavily weighted in our selection process, but it is only one of several factors. The committee also reviews applicants' grades/marks and test scores, leadership and achievements, ability to express oneself through an essay, as well as extracurricular activities. Applicants will receive written notification regarding their application by the end of April.

Who needs to complete the PFS? A parent, whose son or daughter has applied in hopes of being considered for a \$12,500 scholarship.

Who should not complete the PFS? The parent of an applicant who is:

- competing for the \$3,000 Jefferies Award of Merit only (due to little or no financial need)
- completing the quick application only, in hopes of winning the \$3,000 Application Incentive Award drawing
- a current recipient applying to renew his or her scholarship for a second year



HOW TO COMPLETE THE PARENTS' FINANCIAL STATEMENT (PFS) ONLINE

- Go to sssbynais.org/parents.
- Login using the same email and password as last year or create an account with your email address and a password.
- Begin a PFS for Academic Year 2020-21. You can log out of the PFS Online at any time, then return later to complete it.
- For the question regarding level or grade in school, **if your son or daughter is applying for college or graduate school, please mark the post-graduate box.**
- After you have pressed pay and submit button, you will be brought to a payment screen. **Do not pay. JFS will pay the fee of all applications through fee waivers, but will not be able to reimburse you if you choose to pay it yourself.**
- Send Regina an email with Fee Waiver Request in the subject line and she will apply a fee waiver so that you may continue.
- You will not be able to upload documents until the payment with waiver has been processed, which may take up to 24 hrs.
- After the payment is processed, you will receive an email from SSS allowing you to access on the PFS Online. Within the section called "Manage Documents," you can upload the additional documents we require.



HOW TO SUBMIT ADDITIONAL REQUIRED DOCUMENTS ONLINE

- Prepare your documents to be uploaded. Make sure the documents are on your computer, each saved as a separate file. Remove any security or password protection from your document files.
- Return to the PFS Online and login.
- Select the Academic Year 2021-22 button.
- From the PFS Online, click on the "My Documents" tab.
- On the "My Documents" page, you will see an upload button or a hyperlink next to a specific document name in the "Required Documents" section of the PFS. Clicking either the upload button or a hyperlink will lead you through a series of steps allowing you to name, locate and save the file.
- Once you have uploaded a document, the date will appear in the "Date Uploaded" column within minutes of the upload. Some tax documents go through a verification process, which can take up to 48 hours to complete.
- Once submitted, the PFS cannot be withdrawn. If you wish to submit required documents by regular USPS mail, send to School and Student Services, PO Box 449, Randolph, MA 02368-0449.

KEY INFORMATION YOU NEED, TO COMPLETE THE PFS

Organization's code (referred to as the SSS code): **9047**

Organization/School name: **Jefferies Family Scholarship**

When prompted for payment: **do not pay; email Regina at rdewetter@jefferies.com and she will apply a waiver.**

Final step: **after a fee waiver has been applied, then you can upload required documents.**

Due date for completing the PFS: **February 10**

Due date for submitting documents (see below): **February 15**

Documents we require you to submit, in addition to the PFS: **US Applicants**
1040, 1040A, or 1040EZ – 2019 and W-2 Form - 2020
International Applicants
Any tax document - to substantiate data you entered.

Although the program coordinator Regina de Wetter will grant extensions if necessary and is able to answer questions about the JFS application, **representatives at SSS are better able to answer questions about the PFS Online, so if you need help completing the financial need section, please contact SSS customer service at (800) 344-8328.**