

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 child, 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 HIGHLIGHTED 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 each applicant's academics, ability to express oneself through an essay, special circumstances (if applicable), and extracurricular activities. Applicants will receive written notification regarding their application by the end of April.

Who needs to complete the PFS? Parents of children who have applied for a \$12,500 educational 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).
- competing for the \$3,000 Application Incentive Award drawing.
- a current recipient applying to renew his or her scholarship for an additional year.

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

- Go to the [SSS](#) website.
- 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 2025-26. You may log out at any time and return later to complete it.
- For the question regarding level or grade in school, if your child is applying for college or graduate school, please mark the post-graduate box.
- After you have pressed the 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.**
- Send the [coordinator](#) an email with **Fee Waiver Request** in the subject line. A fee waiver will be applied so that you may continue.
- You will not be able to upload documents until the payment with the waiver has been processed, which may take up to 48 hrs.
- After payment processing, you will receive an email from SSS allowing you to access and upload documents on the PFS Online.

HOW TO SUBMIT ADDITIONAL REQUIRED DOCUMENTS ONLINE

- Prepare your documents to for upload. 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 2025-26** 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.

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 the coordinator at rdewetter@jefferies.com and she will apply a waiver.**
- Last step: **after** a fee waiver has been applied, **then you can upload required documents.**
- **Deadline** for completing the PFS: **February 15**
- **Deadline** to submit documents: **February 15**

DOCUMENTS WE REQUIRE YOU TO SUBMIT

US Applicants: 1040, 1040A, or 1040EZ – 2023 and W-2 Form – 2024

International Applicants: **UK** – P60s, **Spain** – Certificado de retenciones e ingresos a cuenta del Impuesto sobre la Renta de las Personas Físicas (Tax Certificate), **Australia** – PAYG Payment Summary, **China** – Individual Income Tax (IIT) Return, **India** – Form 16, **Japan** – Certificate of Income & Withholding Tax (Gensen Choshu Hyo), **Hong Kong** – Employer's Tax Return IR56B, **Singapore** – Form IR8A
Any other appropriate tax document – To substantiate data you entered.

The scholarship program coordinator can answer questions about the JFS application, however, representatives at SSS are better able to answer questions about the PFS Online. For help with the PFS, please contact SSS customer service at (800) 344-8328.