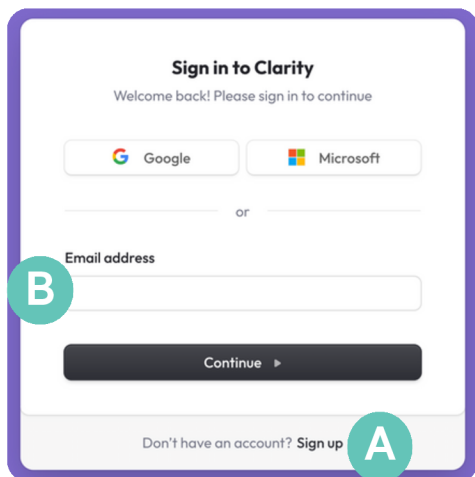


Family Application Guide

This guide will walk you step-by-step through the Clarity application for the 2025 - 2026 academic year.

LOGGING IN

The entire process will be completed at app.clarityapp.com

A screenshot of the Clarity login page. The page has a white background with a purple border. At the top, it says "Sign in to Clarity" and "Welcome back! Please sign in to continue". Below this are two buttons for "Google" and "Microsoft". In the center, there is a text input field labeled "Email address" and a "Continue" button. At the bottom, there is a link that says "Don't have an account? Sign up". Callout A points to the "Sign up" link, and callout B points to the "Email address" input field.

- A** Click "Sign Up" then create your account:
- Click "Create an account"
 - Provide your name and email
 - Create your password

- B** Log back in to your existing Clarity account

NOTE: All users must create a new Clarity account your first time using the system. The direct link for first-time users to sign up is auth.clarityapp.com/en/signup.

Your account will not be carried over from other financial aid systems you may have used in previous years.

Need more help?

We encourage you to keep this guide open as you complete your application to help answer questions and provide explanation when needed. But if you get stuck, you can contact us at: support@clarityapp.com

Before you begin

- 03** Important Tips Before You Begin
- 03** The Process
- 04** Your Portal

Step 1: People

- 05** Parents or Guardians
- 07** Second Parent or Guardian
- 08** Address(es)
- 09** Student Applicants
- 10** Editing Student Applicants and Other Dependents
- 11** Household Summary

Step 2: Background

- 12** Background Questions

Step 3: Verification

- 13** Form 4506c

Step 4: Financials

- 14** Taxable Income
- 15** Non-taxable Income
- 16** Monthly Expenses
- 17** Out of Pocket Expenses
- 18** Assets - Primary Residence
- 19** Assets - Other Real Estate
- 20** Assets - Vehicles
- 21** Other Assets
- 22** Assets - 529 Plans
- 23** Liabilities
- 24** Businesses

Step 5: Review & Submit

- 25** Other Considerations
- 26** School Questions
- 27** Payment
- 28** Submit Application

Step 6: Documentation Requests

- 29** Upload Additional Documents

Step 7: Financial Aid Notification

- 30** Hearing Back from School(s)
- 30** Frequently Asked Questions

IMPORTANT TIPS BEFORE YOU BEGIN

- ✓ Make a list of the schools you're applying to. Be sure to note their deadlines (both admission and financial aid) and requirements.
- ✓ You only need to complete one Clarity application per household. Your application will cover any number of schools using Clarity and any number of children in your household.
- ✓ Gathering documents and information like your most recent tax documents can help you complete the application.
- ✓ Throughout the application you will see this symbol:  Hover your mouse or tap your finger on this symbol to see helpful tips and explanations.
- ✓ Be sure to monitor your Clarity portal throughout the application process. Schools may require additional documents—those requirements will be displayed in the "Document Requests" section of your portal.
- ✓ While the Clarity application is designed to be easy enough to fill out in one sitting, you can save your work at any time and come back to it later. Be sure to always click the "Save and continue" button at the bottom of the page to save your work.

THE PROCESS



Complete the application

- Click "[Continue Application](#)" from your portal Home page to begin or continue your application.
- Complete your biographical information. add applying students and indicate which schools you're applying to.
- Sign and submit a Form 4506c to give Clarity permission to pull your prior year tax returns. This means you won't need to upload any of them yourself!
- Complete your financial information.
- NOTE: The responsive application will shift the questions you see based on your answers, kind of like TurboTax.



Submit and pay

- The Clarity application fee is \$60 and covers all the Clarity schools you're applying to and any number of children in your household.
- Once you submit your application, you will not be able to make changes to your tax filing status, indication of if you do or do not receive a United States W2, and information entered on the IRS 4506C. Make sure you have indicated accurate social security number(s) and exact address used for filing of your 2023 taxes to avoid errors and delays.



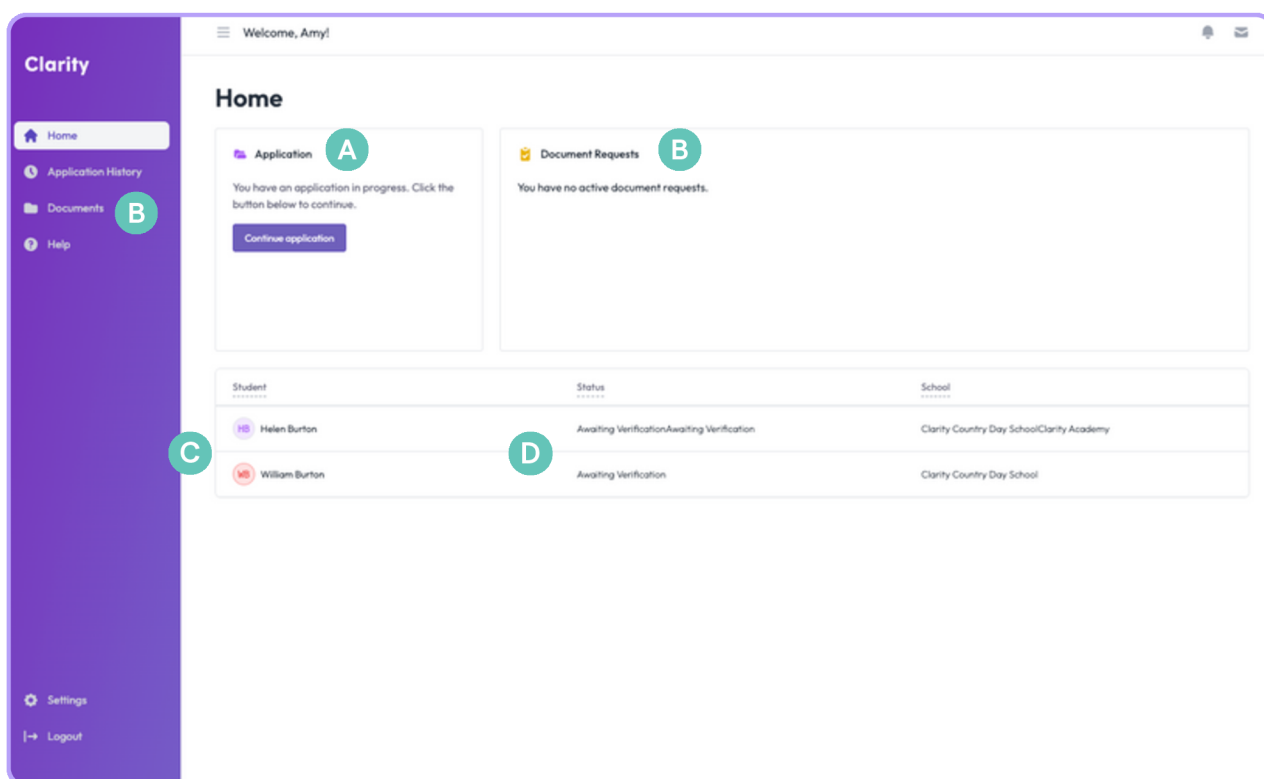
Upload any extra documents

- Schools may require additional documents in addition to last year's taxes.
- Check the "Document Requests" panel on your portal to see what you need to upload.

YOUR PORTAL HOME

From your portal homepage, you can:

- Access your application
- Review any additional document requirements
- Manage and upload documents
- View your student(s) and application status(es)



A Click to continue your application in progress

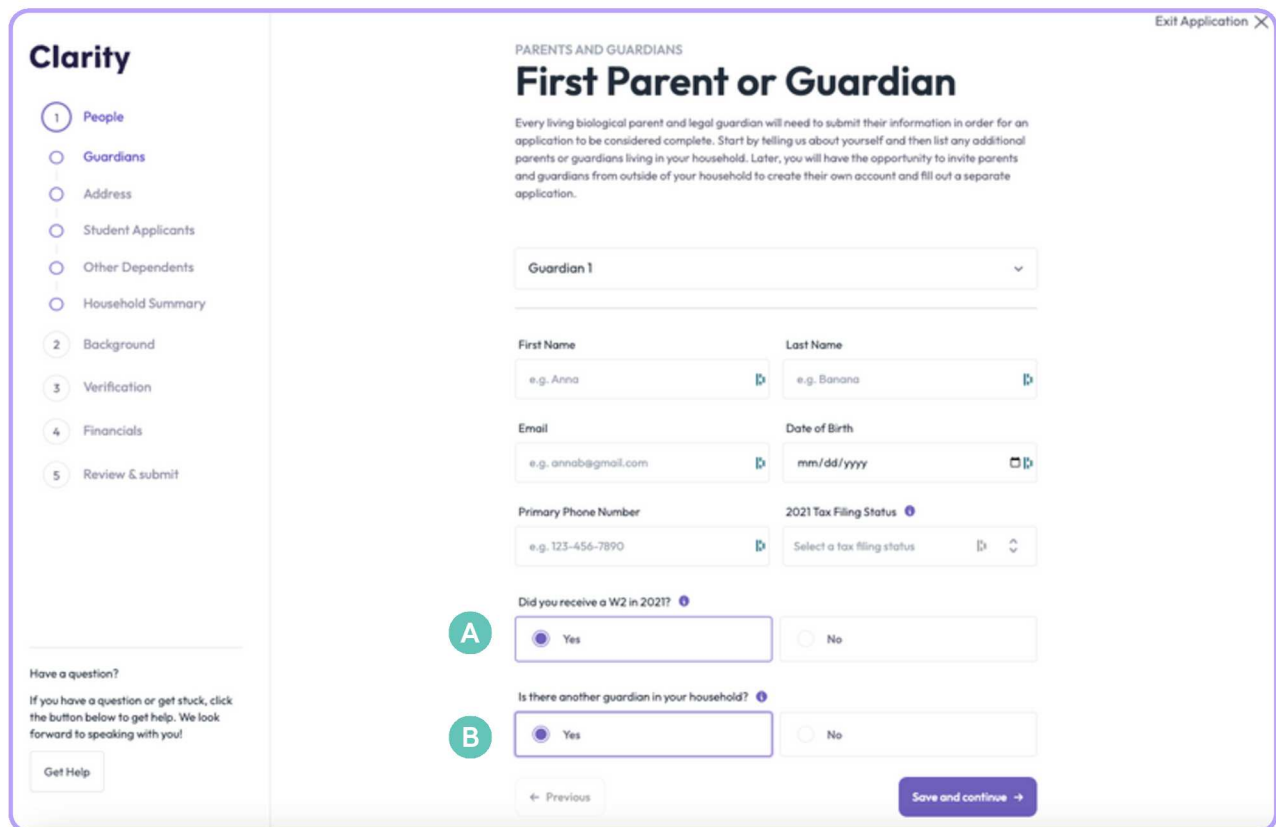
B View document requirements and upload

C View your applying students

D Monitor your application status at each school you are applying to

PARENTS OR GUARDIANS

- Every living biological parent and legal guardian will need to submit their information for an application to be considered complete.
- Start by telling us about yourself.
- Then list any additional parents or guardians living in your household.
- Later, you will have the opportunity to invite parents and guardians from outside of your household to create their own account and fill out a separate application.



The screenshot shows the Clarity application interface. On the left is a sidebar with a progress indicator showing five steps: 1. People (selected), 2. Background, 3. Verification, 4. Financials, and 5. Review & submit. Below the sidebar is a 'Get Help' button. The main content area is titled 'PARENTS AND GUARDIANS' and 'First Parent or Guardian'. It includes a dropdown for 'Guardian 1' and several input fields: 'First Name' (e.g., Anna), 'Last Name' (e.g., Banana), 'Email' (e.g., annab@gmail.com), 'Date of Birth' (mm/dd/yyyy), 'Primary Phone Number' (e.g., 123-456-7890), and '2021 Tax Filing Status' (a dropdown menu). There are two questions with radio button options: 'Did you receive a W2 in 2021?' (Yes/No) and 'Is there another guardian in your household?' (Yes/No). At the bottom are 'Previous' and 'Save and continue' buttons. An 'Exit Application' link is in the top right corner.

A

If you received only a 1099 in your most recent tax year, answer "No" to this question.

B

Only answer "Yes" to this question if there is another parent or guardian living at your same address. If you are divorced or separated, answer "No". You will be able to add additional guardians living outside your home later in the application.

PARENTS OR GUARDIANS CONT.

- Complete Occupation Details for each parent or guardian.

2. Occupation Details

Current Occupation **A**

eg. Registered Nurse

What's the name of the organization that employs you? **B**

eg. Mount Sinai Hospital

How many years have you been working for your current organization? **C**

#

eg. 7

← Previous

Save and continue →

A

What is your current occupation?
Enter "N/A" if not applicable.

B

What is the name of your current employer? Enter "N/A" if not applicable.

C

How many years have you been working for your current employer?
Enter 0 if not applicable.

SECOND PARENT OR GUARDIAN

- If you answered "No" to an additional parent or guardian living in your home on the previous page, you will not see this step. Move to the next page of the guide.

Clarity

1

People

Guardians

Address

Student Applicants

Other Dependents

Household Summary

2

Background

3

Verification

4

Financials

5

Review & submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

Exit Application

PARENTS AND GUARDIANS

Second Parent or Guardian

Every living biological parent and legal guardian will need to submit their information in order for an application to be considered complete. Start by telling us about yourself and then list any additional parents or guardians living in your household. Later, you will have the opportunity to invite parents and guardians from outside of your household to create their own account and fill out a separate application.

Guardian 2

First Name

e.g. Anna

Last Name

e.g. Banana

Email

e.g. annab@gmail.com

Date of Birth

mm/dd/yyyy

Primary Phone Number

e.g. 123-456-7890

2021 Tax Filing Status

Select a tax filing status

Did you receive a W2 in 2021?

Yes

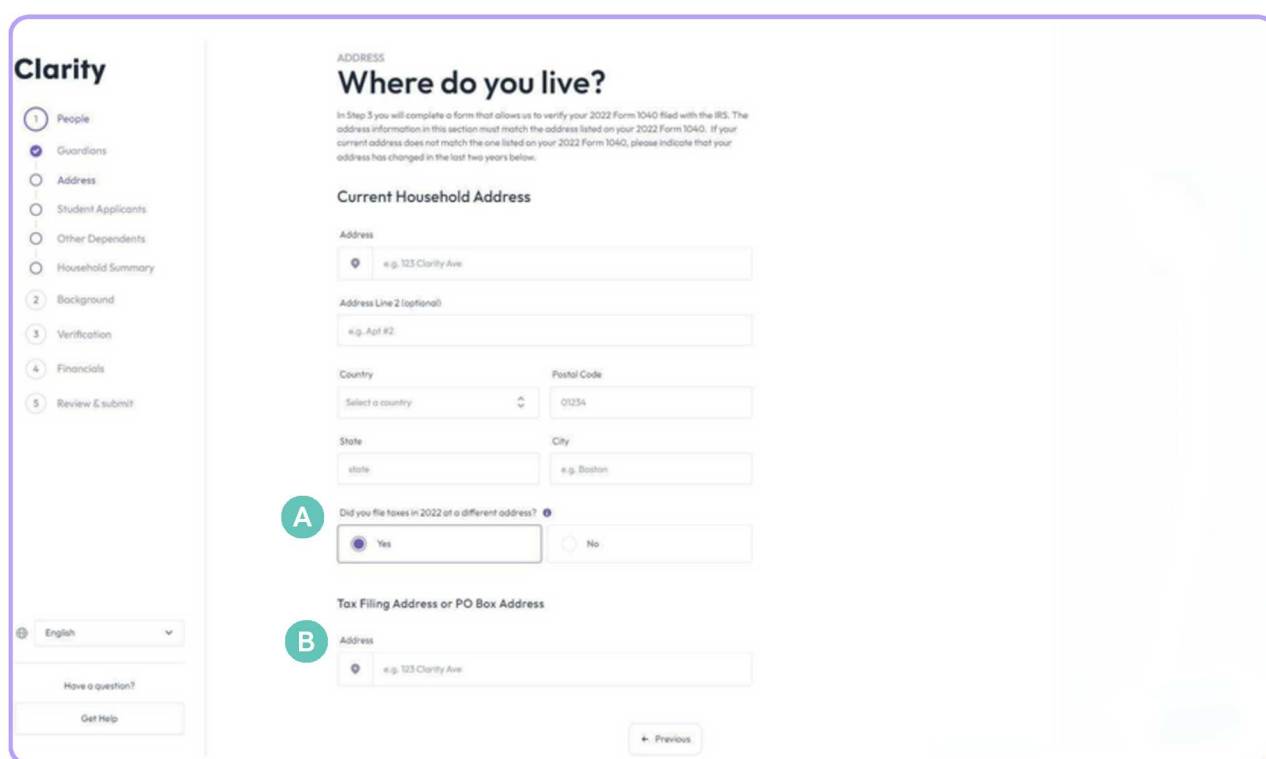
No

← Previous

Save and continue →

ADDRESS(ES)

- Later in the application—during Step 3, "Verification"—you will complete a Form 4506c. The Form 4506c will allow us to verify your most recent Form 1040 filed with the IRS.
- The address information in this section must match the address listed on your most recent Form 1040.
- If your current address does not match the one listed on your most recent Form 1040, please indicate that your address has changed in the last two years in this section.



The screenshot shows the 'Where do you live?' section of the Clarity application. On the left is a sidebar with a progress indicator showing steps: 1. People (selected), 2. Background, 3. Verification, 4. Financials, and 5. Review & submit. Below the sidebar are links for 'Have a question?' and 'Get Help'. The main content area is titled 'ADDRESS Where do you live?' and includes a note about Step 3 verification. It contains two main sections: 'Current Household Address' and 'Tax Filing Address or PO Box Address'. The 'Current Household Address' section has fields for Address, Address Line 2 (optional), Country, Postal Code, State, and City. Below these is a question 'Did you file taxes in 2022 at a different address?' with 'Yes' and 'No' radio buttons. The 'Tax Filing Address or PO Box Address' section has an 'Address' field. A 'Previous' button is at the bottom right. Callout A points to the 'Did you file taxes...' question, and callout B points to the 'Tax Filing Address' field.

A

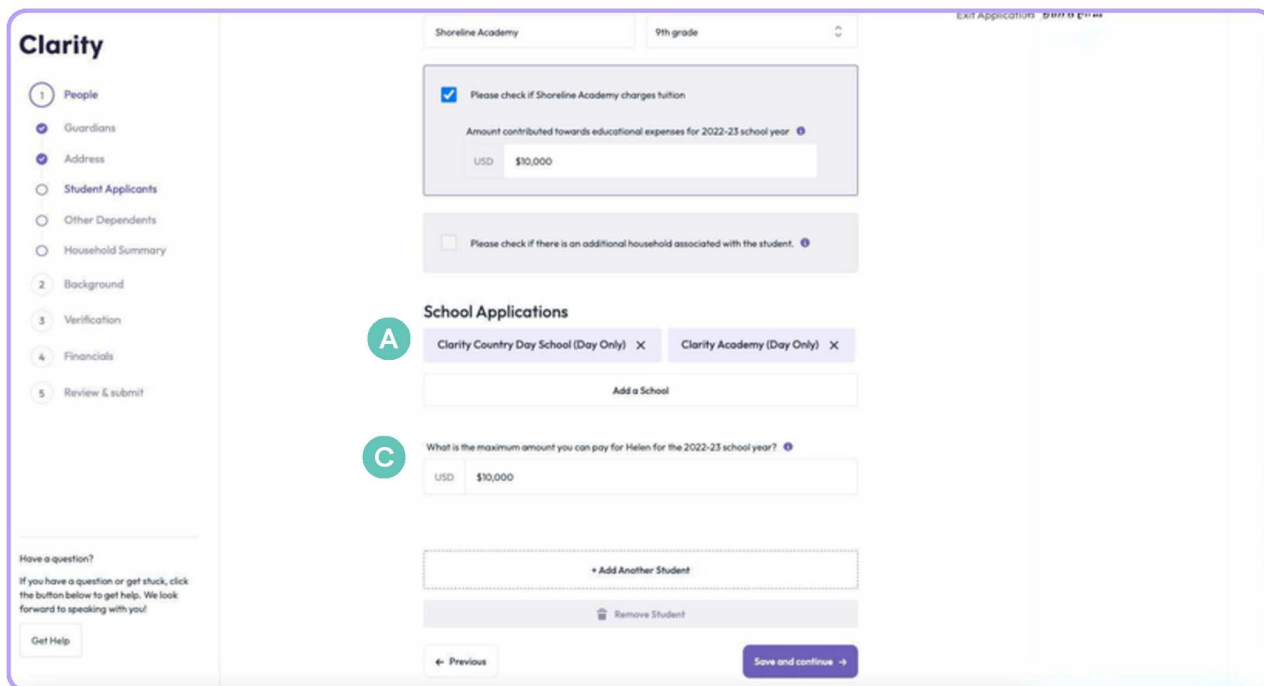
Indicate here if your address has changed in the last two years.

B

Enter the previous address that matches the address listed on our most recent Form 1040.

STUDENT APPLICANTS

- Only list students here who are applying to or re-enrolling at schools who accept Clarity applications.
- You will be able to add additional dependents later in the next section.

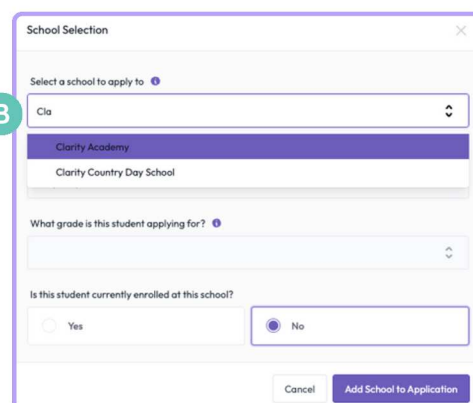


The screenshot shows the Clarity application form for Student Applicants. The left sidebar contains a navigation menu with the following items: 1 People (selected), Guardians, Address, Student Applicants, Other Dependents, Household Summary, 2 Background, 3 Verification, 4 Financials, and 5 Review & submit. The main content area is titled "Shoreline Academy" and "9th grade". It includes a checkbox for "Please check if Shoreline Academy charges tuition" (checked) and a text input for "Amount contributed towards educational expenses for 2022-23 school year" (USD \$10,000). Below this is a checkbox for "Please check if there is an additional household associated with the student." (unchecked). The "School Applications" section shows two schools: "Clarity Country Day School (Day Only)" and "Clarity Academy (Day Only)". There is an "Add a School" button. Below the schools is a text input for "What is the maximum amount you can pay for Helen for the 2022-23 school year?" (USD \$10,000). At the bottom, there are buttons for "Add Another Student", "Remove Student", "Previous", and "Save and continue".

A Add all schools that Student 1 is applying to. Your Clarity application will be sent to each school that you add.

B In the "Add a School" window, start typing the name of the school you wish to add. Or, click the  to scroll through a full list of schools that accept Clarity applications.

C Estimate the amount you can pay for Student 1 next school year.



The screenshot shows the "School Selection" modal window. It has a title bar with a close button. The main content area includes a text input for "Select a school to apply to" with the value "Cla". Below this is a list of schools: "Clarity Academy" (highlighted) and "Clarity Country Day School". There is a text input for "What grade is this student applying for?". At the bottom, there is a radio button for "Is this student currently enrolled at this school?" with "No" selected. There are "Cancel" and "Add School to Application" buttons.

EDITING STUDENT APPLICANTS AND OTHER DEPENDENTS

- Be sure all details for your student applicants and other dependents are correct before submitting your application.

The screenshot shows the 'STUDENT INFORMATION' section of the Clarity application. On the left is a sidebar with a progress indicator showing steps 1 through 5: People, Guardians, Address, Student Applicants, Other Dependents, Household Summary, Background, Verification, Financials, and Review & submit. Step 1, 'People', is selected. The main content area is titled 'Please provide student details' and includes a sub-header 'STUDENT INFORMATION'. Below this, there is a dropdown menu with 'Helen' selected, a text input field with 'Helen', and a text input field with 'William'. Further down, there are fields for 'Legal First Name' (Helen), 'Legal Last Name' (Burton), 'Date of Birth' (05/06/2007), 'Gender' (Female), 'Current School' (Shoreline Academy), and 'Current Grade' (9th grade). A green circle with the letter 'A' is placed next to the dropdown menu.

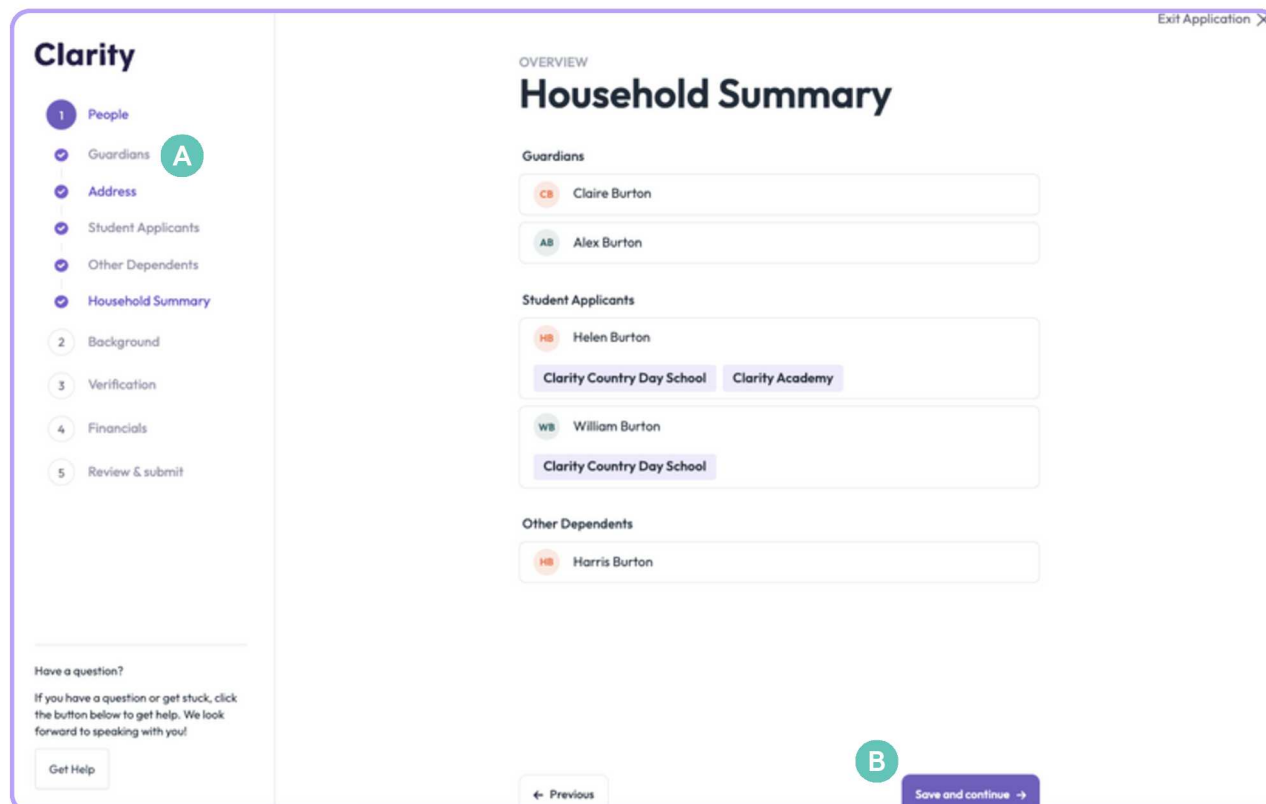
A Once you've added one or more students, use the dropdown menu at the top of this section to toggle between your students and make any necessary edits or additions.

The screenshot shows the 'Add Another Dependent' form in the Clarity application. On the left is a sidebar with a progress indicator showing steps 1 through 5: People, Guardians, Address, Student Applicants, Other Dependents, Household Summary, Background, Verification, Financials, and Review & submit. Step 5, 'Review & submit', is selected. The main content area is titled 'Add Another Dependent' and includes fields for 'Date of Birth' (mm/dd/yyyy), 'Current School' (e.g. Scranton elementary), 'Current Grade' (e.g. Kindergarten), and a checkbox for 'Does the current school charge tuition?'. Below these fields, there is a question: 'In the 2023-24 school year, do you expect this dependent to enroll in a tuition charging school?' with radio buttons for 'Yes' and 'No'. A green circle with the letter 'B' is placed next to the 'Add Another Dependent' button. At the bottom of the form, there are buttons for 'Previous', 'Save and continue', and 'Remove Dependent'.

B Be sure to add all dependents claimed on your most recent tax returns who are not already listed as a parent, guardian or student applicant. Scroll to the bottom of the page to find the "Add Another Dependent" button, if needed.

HOUSEHOLD SUMMARY

- Use this summary step to review the information you've submitted so far.
- Be sure there are no errors or omissions here before proceeding.



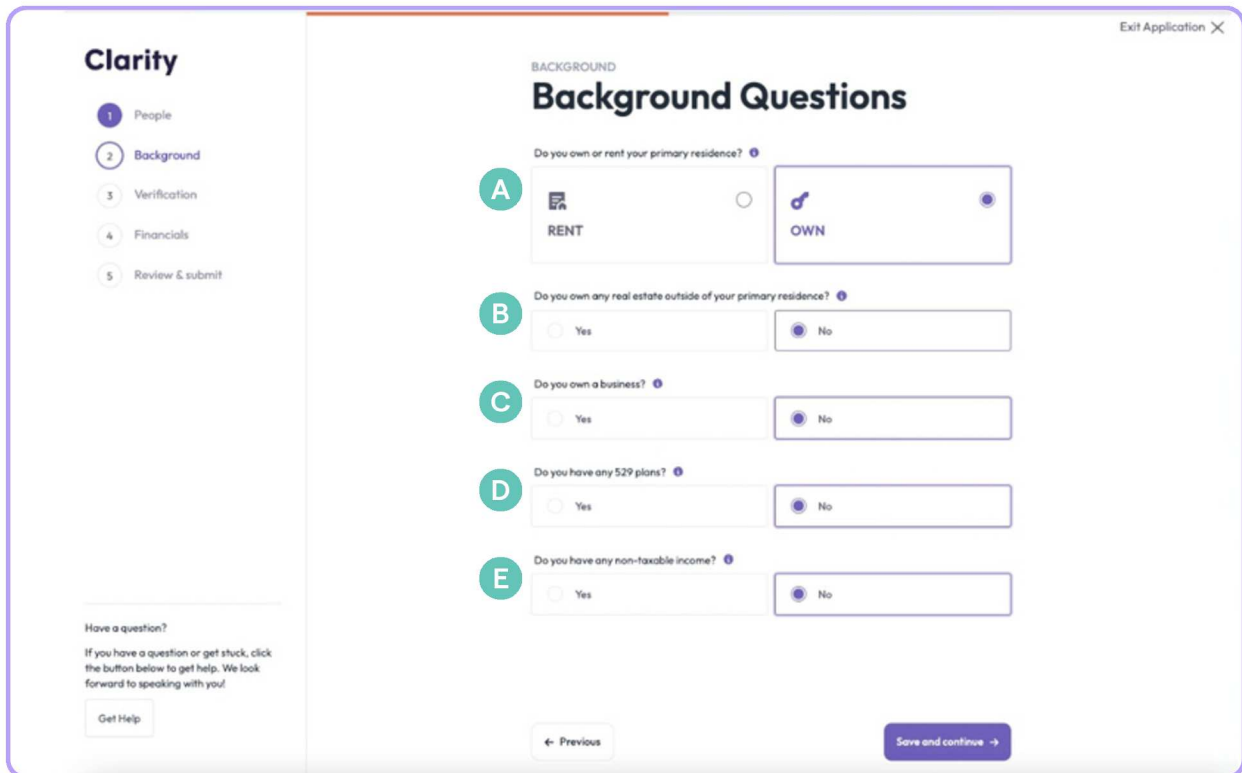
The screenshot shows the 'Household Summary' page in the Clarity application. On the left is a navigation sidebar with a list of steps: 1. People (highlighted with a green circle 'A'), 2. Background, 3. Verification, 4. Financials, and 5. Review & submit. Under step 1, there are sub-items: Guardians (checked), Address (checked), Student Applicants (checked), Other Dependents (checked), and Household Summary (checked). Below the sidebar is a 'Get Help' button. The main content area is titled 'OVERVIEW Household Summary'. It contains three sections: 'Guardians' with two entries (Claire Burton and Alex Burton), 'Student Applicants' with two entries (Helen Burton and William Burton), and 'Other Dependents' with one entry (Harris Burton). Each entry shows a name and a school. At the bottom right, there is a green circle 'B' next to a 'Save and continue' button. A 'Previous' button is also visible at the bottom left of the main content area.

A Click on the name of any section in the left navigation to jump directly to that section and make changes.

B Be sure to always click "Save and continue" at the bottom of any page after making changes. If you click to jump to a different section without clicking "Save and continue" first, your changes will not be saved.

BACKGROUND QUESTIONS

- The questions on this page will help streamline the application for you. To ensure we're asking questions that are relevant to you and your circumstances, the answers you provide here will impact the questions you see later in the application.



The screenshot shows the Clarity application interface for the 'Background' step. On the left is a sidebar with a progress indicator showing five steps: 1. People, 2. Background (current), 3. Verification, 4. Financials, and 5. Review & submit. Below the sidebar is a 'Get Help' button. The main content area is titled 'Background Questions' and contains five questions, each with a lettered icon (A-E) and a help icon. Question A asks about primary residence with 'RENT' and 'OWN' radio buttons. Question B asks about real estate outside primary residence with 'Yes' and 'No' radio buttons. Question C asks about business ownership with 'Yes' and 'No' radio buttons. Question D asks about 529 plans with 'Yes' and 'No' radio buttons. Question E asks about non-taxable income with 'Yes' and 'No' radio buttons. At the bottom are 'Previous' and 'Save and continue' buttons. An 'Exit Application' link is in the top right corner.

A Your "primary" residence is where your family lives for more than 50% of the year.

B Include all real estate, including land, vacation homes, investment properties, etc.

C Answer "yes" if you own 1% or more of any corporation, partnership, LLC or sole proprietorship.

D A 529 plan is a tax-advantaged account that can be used to pay for qualified education costs, including college, K-12, and apprenticeship programs. Answer "yes" if there are any plan(s) your name, your spouse's name, or in any of your dependents' names.

E This includes all income reported as non-taxable on your most recent tax return. Examples include child support and social security.

Step 3: Verification

4506C

- Clarity will fill in most of the information on the Form 4506c for you.
- Be sure that the information that has been filled in for you is correct. Make changes as necessary as you won't be able to edit once signed.
- Each member of your household will need to enter their own social security number and sign this form.

Clarity

PandaDoc [DEV] Clarity - IRS 4506C by Clarity Financial

Please fill in 2 required fields.

Form 4506-C (September 2020) **IVES Request for Transcript of Tax Return** CMS Number 1545-1872

Do not sign this form unless all applicable lines have been completed.
 Required may be required if the form is incomplete or illegible.
 For more information, visit www.irs.gov and search IVES.

1a. Name shown on tax return (if a joint return, enter the name of the first taxpayer)
 Claire Burton

1b. First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)
 Social Security Number

2a. If a joint return, enter spouse's name shown on tax return
 Alex Burton

2b. Second social security number or individual taxpayer identification number (if joint tax return)
 Social Security Number

3. Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)
 123 Main St, Kirkland, WA 98033

4. Previous address shown on last return filed (if different from line 3, give full address)
 123 2nd Ave N, Seattle, Washington 98109

5a. IVES participant name, address, and SOR mailbox ID
 NCS TRV Processing, P.O. BOX 1089, Hammonton, NJ 08037 800-582-7066

5b. Customer file number (if applicable) (see instructions)

Caution: This tax transcript is being sent to the third party entered on Line 5a. Ensure that lines 5 through 8 are completed before signing. (see instructions)

6. Transcript requested. Enter the tax form number (1040, 1065, 1065-B, etc.) and check the appropriate box below. Enter only one tax form number per request. 1040

7. Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2016, filed in 2017, will likely not be available from the IRS until 2018. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213.

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

8. Year or period requested. Enter the ending date of the tax year or period using the mm/dd/yyyy format (see instructions). 12 / 31 / 2020

Caution: Do not sign this form unless all applicable lines have been completed.

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, trustee, administrator, or any other person authorized to sign, I certify that I have the authority to execute Form 4506-C on behalf of the taxpayer. Note: This form must be received by IRS within 132 days of the signature date.

Signature (see instructions) Z Signature Date: 2022-06-13 Phone number of taxpayer on line 1a or 2a: 4255555555

First/Type name: Claire Burton

Title (if line 1a above is a corporation, partnership, estate, or trust)

Sign Here

Spouse's signature Z Signature Date: 2022-06-13

Have a question?
 If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

A See who needs to complete and sign the form.

B Click to start.

C Add the social security number of the person on the corresponding line.

D Double check current address (and previous address, if applicable) for accuracy.

E Click to accept & sign. Click finish at the top once complete.

* NOTE: The 4506c will be signed one parent/guardian at a time.

TAXABLE INCOME

- If your current year taxable income is not finalized, list your best estimate(s).
- You may be required to submit additional documentation for verification.

2024 taxable income

If your 2024 taxable income is not finalized, list your best estimate. You may be required to submit additional documentation for verification.

2024 Estimated Taxable Income for Brian

A Total Salaries and Wages ⓘ USD \$0	B Dividend and Interest Income ⓘ USD \$0
C Self Employment Income ⓘ USD \$0	D Capital Gains ⓘ USD \$0
E Other Taxable Income ⓘ Add Other Taxable Income +	
F Do you expect your 2025 income to increase or decrease by more than 10%? ⓘ ☐ Yes ☒ No / I don't know	

← Previous

Save and continue →

A List each parent or guardian's combined gross total of salaries and wages. Found in box 1 of your W2.

C Exclude any amount indicated in the "Total Salaries and Wages" section above. This is line 3 from Schedule 1 of your 1040.

E Add any taxable social security, pension and annuities, IRA distributions and anything else listed on schedule 1 of your 1040 here.

B List the combined gross total of any dividends or interest payments received by the end of the current year. Dividend totals are line 2b and Interest totals are line 3b of your 1040.

D This includes any realized capital gains received by the end of the current year. This is line 7 of your 1040.

F If you answer "Yes" here, you will be asked to forecast the coming year.

NON-TAXABLE INCOME

- If your current year income is not finalized, list your best estimate(s)
- You may be required to submit additional documentation for verification

2024 non-taxable income for Brian

If your 2024 income is not finalized, list your best estimate(s) required to submit additional documentation for verification.

2024 Estimated Non-Taxable Income

Child Support

USD

Social Security i

USD

Other Non-Taxable Income i

Add Other Taxable Income +

A

Only include the non-taxable component of Social Security income.

B

Include any other non-taxable income sources. Examples include gifts, inheritances, and certain other types of non-taxable benefits.

C

If you like, you can add a note to your application anywhere you see this option.

MONTHLY EXPENSES

- Use the sliders on this page to select an appropriate range for your household.
- If items like retirement contributions or union dues are paid on an annual basis, please divide your gross total by 12.

What are the household's 2024 monthly expenses?

A

Monthly Rent / Mortgage Cost (primary residence only) ⓘ

USD\$0

B

Utilities (primary residence only) ⓘ

\$100 - \$200

C

Health Insurance ⓘ

\$1 - \$100

D

Food and Clothing ⓘ

\$100 - \$200

E

Transportation ⓘ

\$100 - \$200

F

Post-tax Retirement Contributions ⓘ

\$1 - \$100

G

Union Dues ⓘ

\$0

H

Child Support ⓘ

\$0

I

Student Loan Payments ⓘ

\$0

J

Charitable Contributions ⓘ

\$0

K

Childcare / Daycare ⓘ

\$0

Eldercare ⓘ

\$0

Alimony ⓘ

\$0

Add a note to this section

← Previous

Save and continue

- A

This includes property taxes, and HOA fees.
- B

Includes electricity, water, gas, internet, heating oil and phone bills. You may also include sewage, trash, and recycling monthly costs.
- C

Includes monthly actual paid premiums for health, dental and vision insurance policies. Do **not** include actual out-of-pocket healthcare expenses.
- D

This includes all monthly grocery, restaurant, and clothing expenses.
- E

Includes all monthly transportation expenses including car payments, gas, public transportation, rideshares, etc.
- F

Includes contributions made to post-tax account like a Roth IRA.
- G

If paid on an annual basis, divide total gross dues by 12.
- H

Only include paid child support payments.
- I

Includes student loan payments made on behalf of yourself and any dependents.
- J

Includes monthly contributions to any 501(c)3.
- K

Includes monthly contributions to any daycare or eldercare services.

OUT OF POCKET EXPENSES

- List unexpected, out of pocket expenses that you had in the current year.
- Examples include legal fees, funeral expenses, and nursing home fees.
- You may be asked to provide documentation for any expenses listed in this section.

Did you have any Out of Pocket Expenses in 2024?

Please list out of pocket expenses that you had in 2024 that were not listed in the previous section. Include note explaining these expenses. You may be asked to provide documentation for any expense listed in this section.

Out of Pocket Expenses

A

Add Out of Pocket Expense +



Choose one of the provided options, or choose "Enter your own". A description of each is required.

ASSETS - PRIMARY RESIDENCE

- Your "primary" residence is where your family lives for more than 50% of the year.

Clarity

1

People

2

Background

3

Verification

4

Financials

✓

Income

✓

Expenses

○

Assets

○

Liabilities

○

Businesses

5

Review & submit

English

Have a question?

Get Help

PRIMARY RESIDENCE

Tell us about your home

A

What is the address of your primary residence?

Search for your address

What year did you purchase this property?

What is the current market value of this property?

USD

\$250,000

What is the current balance of all mortgages for this property?

USD

\$150,000

What are the annual property taxes for this property?

\$0

What is your annual premium for homeowner's insurance for this property?

\$0

Add a note to this section

← Previous

Save and continue →

A Begin typing your address. Then select your complete address from the dropdown list that appears. If your address does not appear in the dropdown, type your complete address in the box and then click on the next box on the page to continue filling out the application.

ASSETS - OTHER REAL ESTATE

- In this section, please include the information pertaining to any additional real estate which you own in full or in part. Examples include: rental properties, vacation homes, etc.

Clarity

1

People

2

Background

3

Verification

4

Financials

Income

Expenses

Assets

Liabilities

Businesses

5

Review & submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

OTHER REAL ESTATE

Tell us about your other properties

A

Other Real Estate 1

What is the address of this property?

111 1st Ave NE, Seattle, WA 98115, USA

When did you purchase this property?

2000

What is the purpose of this property?

Rental Property

What is the current market value of this property?

USD

250000

What is the current balance of all mortgages for this property?

USD

150000

+ Add Another Property

Remove Other Real Estate

Add a note to this section *

Previous

Save and continue

- A

If you add two or more properties in this section, use the dropdown list at the top of the page to toggle between entries.

ASSETS - VEHICLES

- In this section, please indicate the information regarding monthly expenses for all vehicles you own or lease and include the value/payment information for those vehicles.

Clarity

1 People

2 Background

3 Verification

4 Financials

Income

Expenses

Assets

Liabilities

Businesses

5 Review & submit

Have a question?
If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

VEHICLES

Vehicles

A

Vehicle 2

Vehicle 1

Vehicle 2

OWN

LEASE

Make of Vehicle

Honda

Model of Vehicle

Pathfinder

Year of Vehicle

2018

Monthly Financing Expense

USD ex. \$300

Add Another Vehicle +

Remove Vehicle

Add a note to this section +

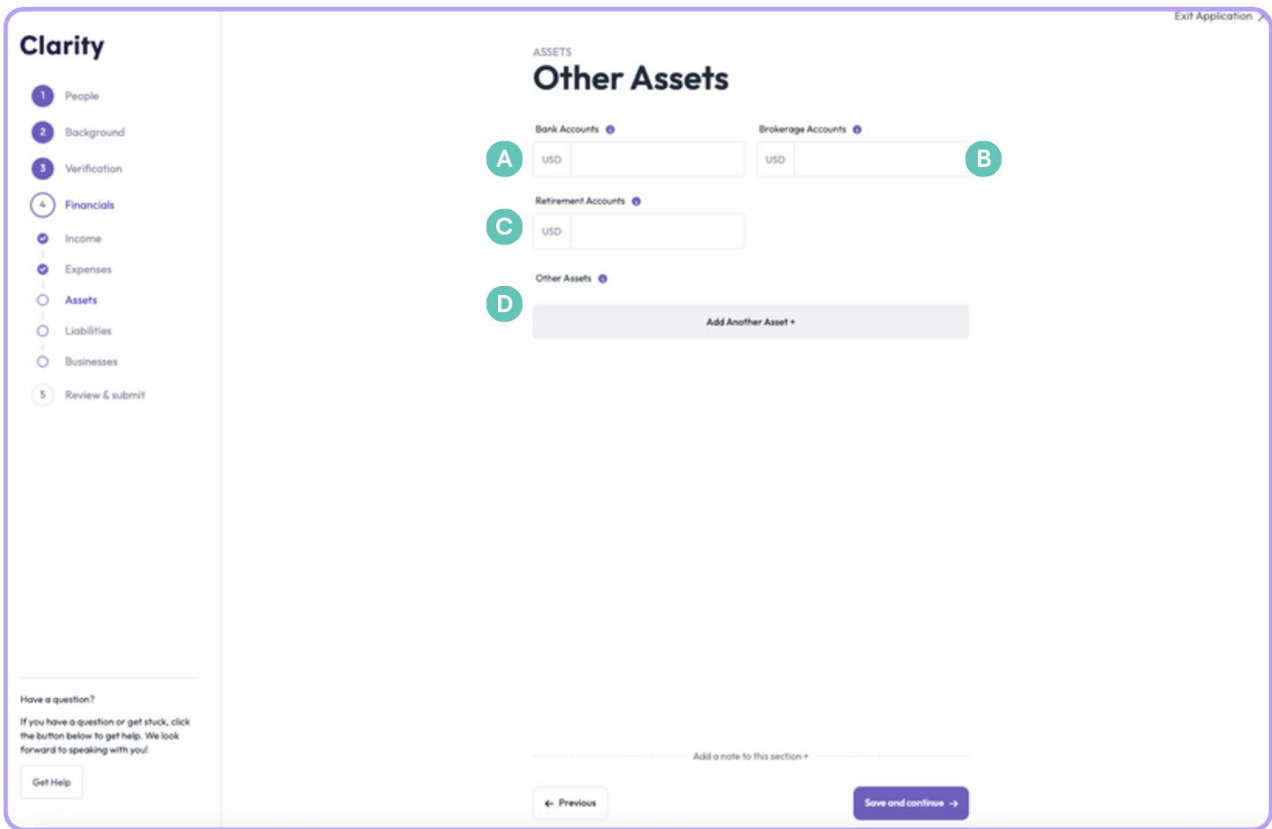
Previous

Save and continue

A If you add two or more vehicles in this section, use the dropdown list at the top of the page to toggle between entries.

OTHER ASSETS

- In this section, please include information for the total monetary value of all additional assets not previously accounted for in the application.



A Enter the total average monthly balance for all accounts over the past 12 months.

B Includes all money invested, excluding retirement accounts.

C Enter the total value of all retirement accounts.

D Itemize all remaining assets not listed elsewhere on this application. Examples include trusts and annuities.

ASSETS - 529 PLANS

- A 529 plan is a tax-advantaged account that can be used to pay for qualified education costs, including college, K-12, and apprenticeship programs.
- If your 529 is not in the name of specific dependents, please divide the total amount evenly across all dependents.

Clarity

1

People

2

Background

3

Verification

4

Financials

5

Income

6

Expenses

7

Assets

8

Liabilities

9

Businesses

10

Review & submit

Have a question?

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Get Help

Exit Application

ASSETS

529 Plan Amounts

Enter the total dollar amount of 529 plans itemized by dependent. If your 529 is not in the name of specific dependents, please divide the total amount evenly across all dependents.

Helen Burton

USD5,000

William Burton

USD5,000

Add a note to this section

Previous

Save and continue

LIABILITIES

- In this section, please include the monthly payment amounts for all current outstanding debts for your household.

The screenshot shows the 'LIABILITIES' section of the Clarity application. On the left is a sidebar with a navigation menu: 1 People, 2 Background, 3 Verification, 4 Financials (selected), and 5 Review & submit. Under 'Financials', there are sub-items: Income, Expenses, Assets, Liabilities (selected), and Businesses. The main content area is titled 'LIABILITIES Liabilities'. It contains four sections: 'Credit Cards' (A) with a USD input field; 'Student Loans' (B) with a USD input field and a pre-filled value of '\$125'; 'Unpaid Medical Debt' (C) with a USD input field; and 'Other Debts' (D) with a list of 'ex. Phone payment plans' and a button to 'Add Another Debt'. At the bottom of the form are 'Previous' and 'Save and continue' buttons. A 'Get Help' button is in the bottom left corner of the sidebar.

A

Enter your total outstanding credit card debt.

B

List the total amount of outstanding loans in your or your spouse's name(s). Additionally, please list the total amount of outstanding loans in your dependents' names if you made or intend to make payments on their behalf in the current year.

C

List the total outstanding amount owed for any healthcare related expenses.

D

List all other outstanding debts using the "Add Another Debt" button.

BUSINESSES

- List all businesses where you own 1% or more of any corporation, partnership, LLC or sole proprietorship.

A

If you add two or more businesses in this section, use the dropdown list at the top of the page to toggle between entries.

B

Gross profit/gross income is the revenue earned before taxes and other deductions. Make sure this is consistent with your corresponding tax returns.

C

Net Income/net profit is the profit left after deducting total business expenses from your gross income. Make sure this is consistent with your corresponding tax returns.

D

If you have completed a financing or 409a within the last two years, please use that valuation. Otherwise, please estimate.

E

Liabilities are debts or any other obligations in which your business owes money currently or in the future.

Net Income

Miscellaneous Income - Form 1099 - Line 7
Business Schedule C - Line 31
Business Schedule C-EZ - Line 3
Farm - Schedule F - Line 34
Estates and Trusts - Form 1041 - Line 22

Partnership - Form 1065 - Line 22
Corporation (short form) - Form 1120A - Line 26
C Corporation - Form 1120 - Line 30
S Corporation - Form 1120S - Line 21

OTHER CONSIDERATIONS

- Please list outside sources such as friends, family, or grants that will be contributing to your tuition payments.
- Please include any additional information that may be important to share with the schools to which you are applying

Clarity

1

People

2

Background

3

Verification

4

Financials

5

Review & submit

Other considerations

School questions

Payments

Submit

Have a question?

If you have a question or get stuck, click the button below to get help. We look forward to speaking with you!

Get Help

OTHER

Other considerations

Are there any other sources that you expect to contribute towards your educational expenses in 2022?

Please list any other sources such as relatives, friends, or third party scholarships that you expect to contribute towards your 2023-24 school year educational expenses.

Is there any additional information that you would like to have considered?

Additional information

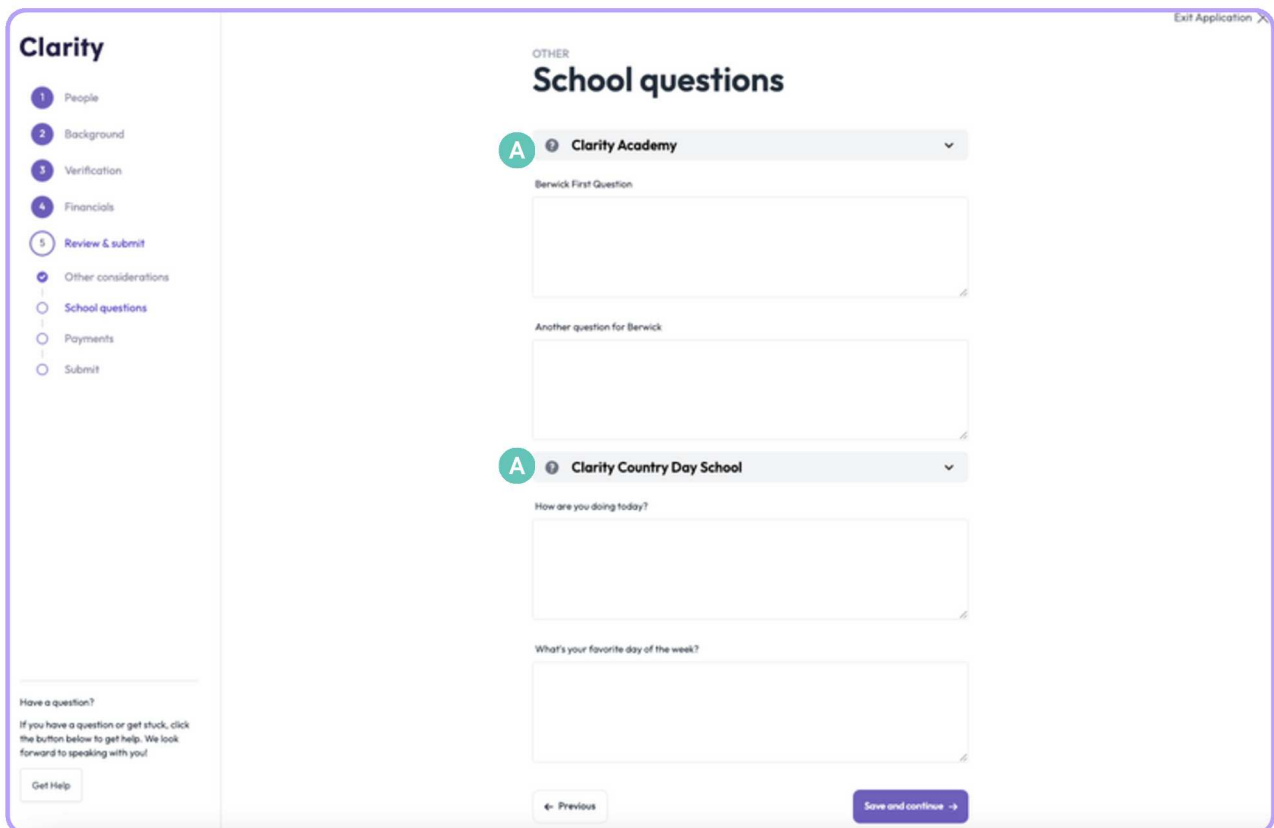
← Previous

Save and continue →

Exit Application

SCHOOL QUESTIONS

- Sometimes, individual schools have additional questions for their applying families.
- If you see questions on this page, that means a school you're applying to would like you to answer their additional question(s).
- The school name labels indicate which school is asking the additional question.



Header indicates which questions come from which schools.

PAYMENT

- The fee to submit your Clarity application is \$60.
- The fee is a flat fee, meaning that it does not change whether you apply for one or multiple children, and to one or multiple schools.

Clarity

1

People

2

Background

3

Verification

4

Financials

5

Review & submit

✓

Other considerations

✓

School questions

○

Payments

○

Submit

English

Have a question?

Get Help

PAYMENT

Payment

Please enter a credit or debit card to pay the \$55 fee and submit your application. This one fee covers sending your application to any number of schools that accept the Clarity application this year. The fee is non-refundable once you've submitted your application in the next step.

A

Have a code?

Card number

1234 1234 1234 1234

VISA

MasterCard

AMERICAN EXPRESS

elo

Expiration

MM / YY

CVC

CVC

Country

United States

ZIP

12345

← Previous

Pay \$55 for Application →

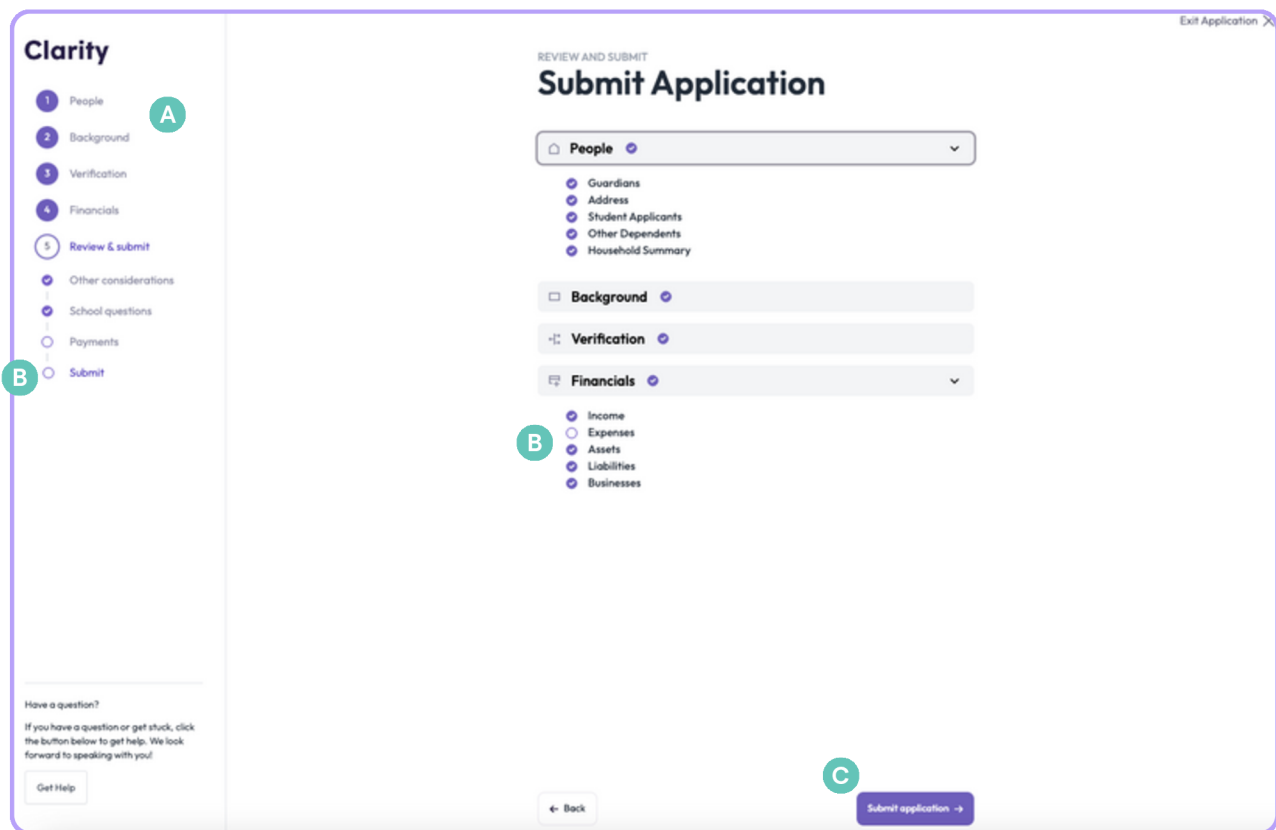
A

Contact the school(s) you are applying to if you need a code to waive the application fee.

Step 5: Review & Submit

SUBMIT APPLICATION

- Use this page to review your entire application.
- Use the left navigation to jump to any part of the application that you would like to review or make changes to before submitting.
- Once you submit your application, copies will be sent to the schools to which you are applying. You will not be able to make changes to your tax filing status, indication of if you do or do not receive a United States W2 and information entered on the IRS 4506C. Make sure you have accurate social security number(s) and exact address used for filing of your 2023 taxes to avoid errors and delays.



A

Click on the name of any section in the left navigation to jump directly to that section and make changes.

C

Be sure to always click "Save and continue" at the bottom of any page after making changes. If you click to jump to a different section without clicking "Save and continue" first, your changes will not be saved.

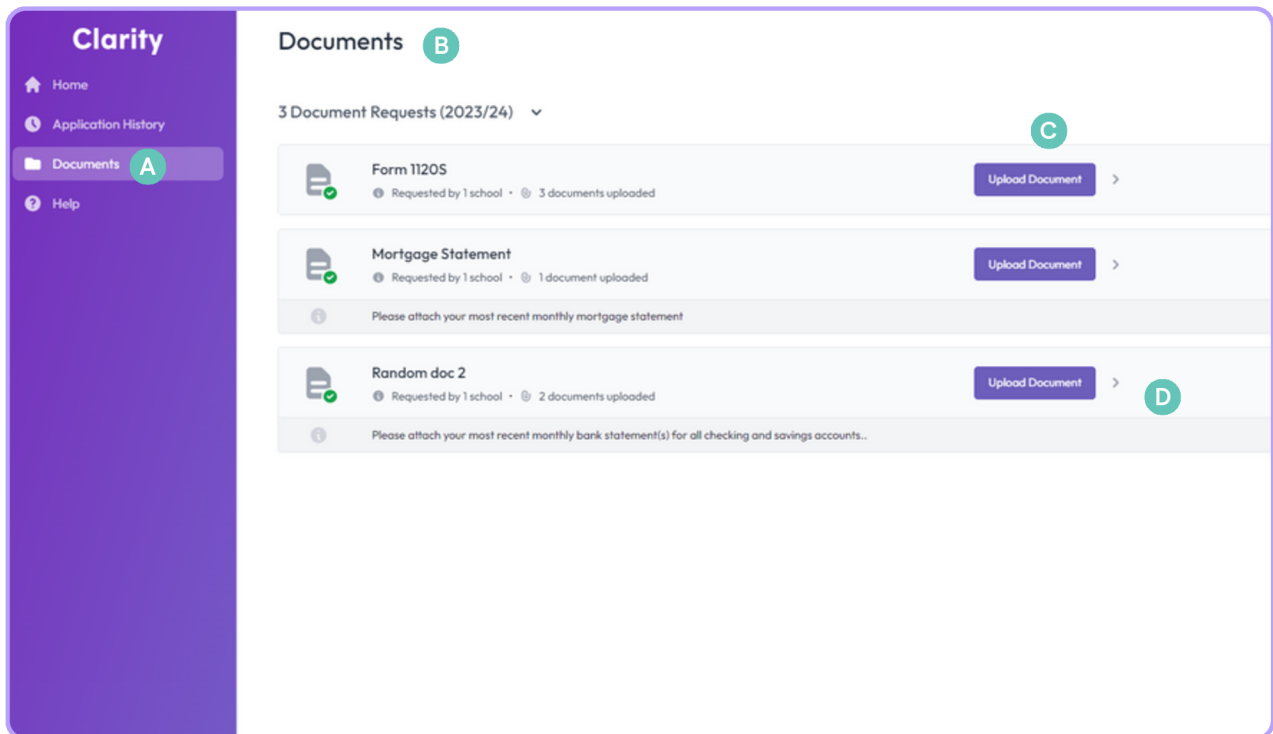
B

A filled-in purple bubble containing a checkmark means that the corresponding section is complete. An empty bubble indicates that a section is incomplete. You will need to navigate to any incomplete sections and fill in missing information before you can submit your application.

Step 6: Documentation Requests

UPLOAD ADDITIONAL DOCUMENTS

- Once your application has been submitted, you may receive requests to upload additional documents for schools.
- From your main homepage, you will be able to upload these files under the Documents section of your portal.
- If any document requests are not applicable, please reach out to the school directly and let them know.



A Click on Documents in your left menu.

B The Documents page will show documentation requests for all schools.

C Click on the "upload document" button to choose a file to upload.

D Click on the arrow to view all uploaded files and/or to delete any uploads.

Step 7: Financial Aid Notification

HEARING BACK FROM SCHOOL(S)

- Once your application is complete and you've uploaded all requested documents, schools will begin the process of reviewing your application.
- You will hear back directly from schools regarding your financial aid decision.

FREQUENTLY ASKED QUESTIONS

✓ **What is a W2?**

A W2 is a wage and tax statement that you should receive from your employer that defines the income you earned, taxes that were withheld and benefits you paid into and/or were provided from your employer.

✓ **Where do I get an access code?**

Please check the school's website or check with their financial aid office directly if an access code is needed to add them to your application.

✓ **Can I add another school to my application later?**

Yes, you can add another school to your application after initial submission under Step 1 Student Applicants.

✓ **What is the status of my application?**

You can find the current status of your application on your main homepage. If it says "submitted" and you've fulfilled all documents being requested, you should be set. If you have any questions about your status, please check with the school's financial aid office directly for any updates.

✓ **What is a Form 1040?**

A Form 1040 is what individual taxpayers use to file their taxes with the IRS.

✓ **Where do I get a fee waiver?**

Please check with the school's financial aid office directly. Clarity does not provide these directly.

✓ **I don't have a specific document to upload that is being requested. What should I do?**

Please reach out to the school's financial aid office directly.

✓ **Can I get a refund?**

Clarity's application policy is non refundable and the only exceptions that can be made is if the school is requesting this directly.

✓ **What if the IRS rejects my 4506c form?**

Please refer to the email you will receive from Clarity that will outline which tax documents we will need your household to manually upload.