

# Enrollment Agreement



Phillips Academy  
ANDOVER

# Due May 1

In enrolling our child

\_\_\_\_\_ in Phillips Academy (the Academy) for the 2009–2010 academic year, we agree to all terms and conditions relating to the enrollment and payment of tuition and fees specified below:

<b>Tuition Charges</b>	<b>Boarding</b>	<b>Day</b>
2009–2010 Annual Tuition	\$39,900	\$31,100
Less Nonrefundable Enrollment Deposit*	<u>(2,000)</u>	<u>(2,000)</u>
Balance Due July 15, 2009	\$37,900	\$29,100

\*Enrollment Deposit Due Date: April 10, 2009, for new students;  
May 1, 2009, for returning students.

Please indicate which of the methods of tuition payment listed below you have chosen by initialing the corresponding line.

\_\_\_ Payment in full will be made by July 15, 2009, which will automatically enroll the student in the Tuition Refund Plan at no cost.

\_\_\_ Payment will be made one-half by July 15, 2009, and one-half by December 1, 2009.

\_\_\_ We will apply to use the Tuition Management Systems Monthly Payment Plan. (Apply **directly** to Tuition Management Systems.)

Any financial aid scholarship grant will reduce the billed amount by the amount of the grant. Other fees, outlined in the Tuition and Fees letter, will be billed as appropriate. All amounts past due, including enrollment deposits, will incur a late charge of 1.5% per month or portion thereof. There is a \$25 per month administrative fee if the Comptroller's Office does not receive a properly completed Enrollment Agreement by the May 1, 2009 due date. The Academy reserves the right to deny enrollment of any student for whom it has not received a properly completed Enrollment Agreement and nonrefundable enrollment deposit by the due date.

Recognizing that the majority of the Academy's expenses and obligations are incurred on an annual basis, we further agree that, if we have not canceled our student's enrollment on or before July 15, 2009, we will be responsible to pay the full year's tuition and fees. Further, we agree that after July 15, 2009, the Academy will not be required to refund payments or cancel unpaid obligations for any reason whatsoever, regardless of our student's withdrawal, dismissal, or absence from the Academy, except in accordance with the terms of the Tuition Refund Plan policy. We understand that the Academy strongly recommends participating in the Tuition Refund Plan (see the complete terms and conditions of the Tuition Refund Plan on the reverse side of this agreement) and that a signature is required by both parents and/or legal guardians should we choose to decline the Tuition Refund Plan.

We acknowledge that if our student's account is past due or the Comptroller's Office has not received a completed Enrollment Agreement, our student will not be permitted to register for the fall term. We also understand that if his/her account becomes past due later in the academic year, the Academy may refuse permission for him/her to continue in attendance.

## Tuition Refund Plan

We have reviewed the Academy's materials concerning the advisability of subscribing to its Tuition Refund Plan (outlined on the reverse side) to protect against the possible loss of amounts paid or to be paid as tuition should a student leave the Academy before the end of the academic year and understand that the Academy strongly recommends that all students be enrolled in the Tuition Refund Plan. **All students are enrolled in this plan unless both parents elect not to participate by signing in the shaded section below right.** The Comptroller's Office must receive written notice of any change in your election by August 31, 2009. Any requested changes after that date will not be honored. We understand that payment of all tuition and fees in full by July 15, 2009, entitles the student to enrollment in this plan at no additional cost. The fee for other participating students is 2.5% of the tuition paid (i.e., tuition reduced by the \$2,000 enrollment deposit and by any financial aid scholarship grant).

## For Academy Use Only

Enrollment Agreement and Tuition Refund Plan Selection accepted on behalf of Phillips Academy

Signed: \_\_\_\_\_ Date \_\_\_\_\_

Sharon G. Kramer, Associate Comptroller—Operational Accounting

We and our student have reviewed the rules and regulations of the Academy as stated in the current catalog and the *Blue Book* and agree to be bound by them. We further agree that the Academy has the right to dismiss or require the withdrawal of any student whenever, in the exercise of its professional judgment, it may be appropriate to do so, including, without limitation, as a result of conduct contrary to its rules or regulations (including conduct that violates the standards contained in the *Blue Book*), behavior unsafe to self or others, or academic performance inconsistent with the standards contained in the *Blue Book*.

**Both parents and/or legal guardians must sign and return this Agreement to the Comptroller's Office.** A fully executed copy will be returned to you for your records. This Agreement will bind the Academy only when signed by its associate comptroller or her designate. The parties to this Agreement agree that it is to be governed by the laws of the Commonwealth of Massachusetts and that the only proper venue for resolution of disputes concerning its interpretation will be in the state and federal courts of competent jurisdiction located in the Commonwealth of Massachusetts.

**Please check one box to identify the billing address.**

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Name (please print): \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Daytime Telephone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Name (please print): \_\_\_\_\_

Address: \_\_\_\_\_

Address: \_\_\_\_\_

Daytime Telephone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

**BOTH PARENTS AND/OR LEGAL GUARDIANS WHO DO NOT WISH TO PARTICIPATE IN THE TUITION REFUND PLAN MUST SIGN THE FOLLOWING STATEMENT FOR IT TO BE EFFECTIVE.**

We understand and agree that, by choosing **not** to participate in the Tuition Refund Plan, we will not be entitled to receive any refund of tuition or release from the obligation to pay the full amount of annual tuition and fees if our student leaves the Academy before the end of the academic year, regardless of the reasons for his/her absence, and we hereby reaffirm our agreement to pay any amounts that are unpaid at the time of any such absence, withdrawal, or dismissal before the end of the academic year.

Signed: \_\_\_\_\_

Signed: \_\_\_\_\_

## Tuition Refund Plan Policy

By enrolling your student at the Academy, the parents and/or legal guardians accept the obligation to make full payment of tuition and other charges for the entire academic year. A significant portion of the Academy's costs is committed at the beginning of the school year based on student enrollment. Consequently after July 15, 2009, the Academy requires full payment of the year's tuition and fees.

## Refund Coverage

The Tuition Refund Plan provides for a 65% refund of the unused portion of the annual tuition (excluding the \$2,000 nonrefundable enrollment deposit and any financial aid scholarship grant) in the event of the absence or withdrawal of the student for any reason, subject to the exclusions listed below.

All refunds are based on the total number of school days (including weekends and holidays, but excluding Thanksgiving, winter, and spring vacations) beginning the first day of new student registration, tentatively scheduled for September 12, 2009, and ending June 3, 2010. The calculation of the number of unused days begins the later of October 15, 2009, or the departure date as established by the Registrar's Office.

## Tuition Refund Plan Cost and Election

The fee is 2.5% of tuition (less the \$2,000 nonrefundable enrollment deposit and any financial aid scholarship grant). The maximum fee is \$947.50 for a boarding student, or \$727.50 for a day student.

Payment of the full year's tuition and fees by July 15, 2009 will automatically enroll the student in this plan at no additional cost.

All students are enrolled in this plan unless an election not to participate in the plan is made in the Tuition Refund Plan section on the reverse side of this document. The Comptroller's Office must receive written notification of any change in your election no later than August 31, 2009. Any requested changes after that date will not be honored.

## Example of the Refund Calculation

The exact number of unused days and school days varies slightly from year to year.

- Period of Separation: October 20 to June 3—176 unused days (estimated for this example)
- Annual Tuition Insured: \$37,900 (\$39,900, minus \$2,000 nonrefundable enrollment deposit; any financial aid scholarship grant is also subtracted)
- Calculation:  $65\% \times \$37,900 \times [176 \text{ unused days divided by } 215 \text{ total days}] = \$20,166$

With a separation on October 20, if full year's tuition had been paid by July 15, refund would be \$20,166; if one-half year's tuition had been paid, net refund payable would be \$1,216 (\$20,166 less \$18,950 tuition due).

## Refund Exclusions

I. Tuition Refund Plan does not provide refund for situations in which the Academy must be closed for reasons beyond its control, such as, by way of example and without limitation: 1) war or act of war, 2) insurrection, rebellion, riot, or civil commotion, 3) any natural or manmade disaster, 4) destruction of the Academy's physical facilities, 5) public health, or 6) failure of municipal or regional infrastructure.

II. Tuition Refund Plan does not provide refund for a withdrawal or dismissal announced prior to October 15, 2009, unless such absence is a result of a medical, mental, or physical condition or disability extending for 31 or more consecutive days. Any claim for coverage as a result of medical, mental, or physical disability must include a certification of the existence of the condition from a practitioner who is legally qualified in the relevant medical specialty on which s/he is opining.

III. Tuition Refund Plan does not provide refund for a temporary absence from the Academy. Refunds will be provided only if a student leaves during the academic year and does not return during the balance of the academic year.

IV. Tuition Refund Plan excludes refund of either the \$2,000 nonrefundable enrollment deposit or any billed fees. However, any unused breakage deposit is separately refundable.

The Comptroller's Office must receive a written request for refund from the parent and/or legal guardian no later than 30 days following the student's departure from the Academy.

## Refunds are made by the Academy in the following order:

- First, applied to the student's outstanding tuition and fees account;
- Second, applied to any outstanding BlueCard balance;
- Third, applied to any outstanding loans from the Academy; and
- Finally, as a refund check to the parent, legal guardian, and/or sponsor for any remaining balance.

## Please refer any questions to:

- Rebecca Marcos, Assistant Bursar (primary contact)  
978-749-4504 or e-mail [bmarcos@andover.edu](mailto:bmarcos@andover.edu)
- Darlene Peracchi, Administrative Assistant  
978-749-4510 or e-mail [dperacchi@andover.edu](mailto:dperacchi@andover.edu)
- Sharon Kramer, Associate Comptroller—Operational Accounting  
978-749-4507 or e-mail [skramer@andover.edu](mailto:skramer@andover.edu)
- Elliot Hacker, Director of Finance and Assistant Treasurer  
978-749-4511 or e-mail [ehacker@andover.edu](mailto:ehacker@andover.edu)

## Return Enrollment Agreement to:

Comptroller's Office  
Phillips Academy  
180 Main Street  
Andover MA 01810-4161



Phillips Academy  
**ANDOVER**