Tuition Refund Plan Terms and Conditions

By enrolling your student at the Academy, the parents or legal guardian(s) 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 upon student enrollment. Consequently, after July 15, 2013, the Academy requires full payment of the year’s tuition and fees.

Refund Coverage

The Tuition Refund Plan (the “Plan”) provides a 65% refund of the unused portion of the annual tuition (excluding the $2,500 nonrefundable enrollment deposit and any financial aid scholarship grant) in the event of the absence, withdrawal, or dismissal of the student from the Academy during the academic year for any reason, subject to the exclusions and other terms and conditions listed below.

All refunds are based upon 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 6, 2013, and ending June 5, 2014. For purposes of determining a refund under the Plan, the calculation of the number of unused days begins on the later of October 1, 2013, or the student’s departure date as established by the Registrar’s Office.

Tuition Refund Plan Cost and Election

The Plan fee is 2.5% of tuition (less the $2,500 nonrefundable enrollment deposit and any financial aid scholarship grant). The maximum fee is $1,117.50 for a boarding student or $855.00 for a day student.

Payment of the full year’s tuition and fees and any prior year balance by July 15, 2013, will automatically enroll the student in this Plan at no additional cost.

All students are enrolled in this Plan unless you affirmatively make the election not to participate. This election is made only by both parents or legal guardian(s) signing the election as required on the reverse side. You must provide written notice of a change in your election to the Comptroller’s Office no later than August 31, 2013. The Academy will not honor any requested changes after that date.

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 5—179 unused days (estimated for this example)
- Annual Tuition Insured: $44,700 ($47,200 minus $2,500 nonrefundable enrollment deposit; any financial aid scholarship grant is also subtracted)
- Calculation: 65% x $44,700 x [179 unused days divided by 224 total days] = $23,218.06

With a separation on October 20, if full year’s tuition had been paid by July 15, the refund under the Plan would be $23,218.06; if only one-half of the annual tuition had been paid, then the net refund payable would be $868.06 ($23,218.06 less $22,350 tuition due).

Refund Exclusions

The Plan does not provide for a refund in the following circumstances:

I. When the Academy must be closed for reasons beyond its control. These reasons include: 1) war or act of war or terrorism; 2) insurrection, rebellion, riot, or civil commotion; 3) any natural or manmade disaster; 4) destruction of all or part of the Academy’s physical facilities; 5) public health; or 6) failure of municipal or regional infrastructure.

II. A withdrawal or dismissal announced prior to October 1, 2013, unless the withdrawal or dismissal 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 condition from a practitioner who is legally qualified in the relevant medical specialty on which he/she is opining.

III. A temporary absence from the Academy. The Plan entitles you to a refund only if a student leaves during the academic year and does not return during the balance of the academic year.

The Plan excludes refund of both the $2,500 nonrefundable enrollment deposit and any billed fees. However, any unused breakage deposit is separately refundable.

Refund Requests

The parent (or legal guardian) must submit a written request for a refund to the Comptroller’s Office 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 parents, legal guardians or sponsor, as the case may be, for any remaining balance.

Please refer any questions to:

- Christine Costa, Administrative Assistant (primary contact) 978-749-4510 or e-mail ccosta@andover.edu
- Anna Pimentel, Bursar 978-749-4504 or e-mail apimentel@andover.edu
- Sharon Kramer, Associate Comptroller—Operational Accounting 978-749-4507 or e-mail skramer@andover.edu
- Andrea T.H. Nix, Director of Finance and Assistant Treasurer 978-749-4511 or e-mail anix@andover.edu

Return the Enrollment Agreement to:

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