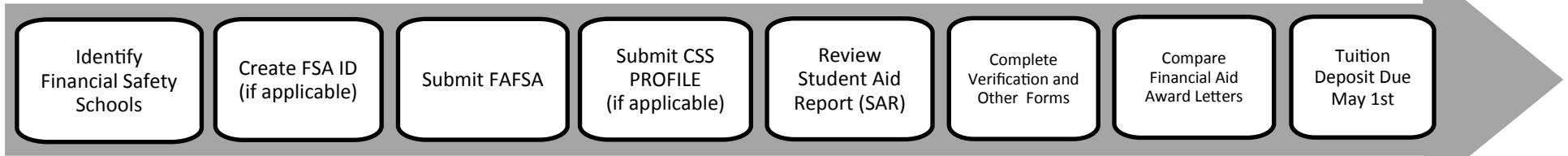


JUNIOR YEAR-SEPTEMBER >> OCTOBER-NOVEMBER >> DECEMBER-FEBRUARY >> MARCH-MAY



**GRANTS AND SCHOLARSHIPS = FREE MONEY!**

**LOANS = BORROWED MONEY**

**WORK-STUDY = EARNED MONEY**

**FSA ID:**

- ★ Self-selected username and password that both students and parents must create.
- ★ Visit [fsaid.ed.gov](http://fsaid.ed.gov) to create a username and password to be able to complete the FAFSA.
- ★ **The FSA ID will need to be created before you can sign and submit your FAFSA.**

**Free Application for Federal Student Aid (FAFSA):** Required by all colleges, universities, and technical programs. Visit [www.fafsa.gov](http://www.fafsa.gov).

- ★ **Apply:** Starting October 1st. Other deadlines may apply. Financial aid process is first come, first served!
- ★ **Cost:** Free!
- ★ **Info Needed:** SS# if applicable, **taxes/earnings from 2015**, investments, checking & savings amount, etc.
- ★ Be sure to have the FSA ID for student and parent in order to complete the FAFSA.
- ★ For the FAFSA, use the IRS Data Retrieval Tool to link taxes if possible!

**CSS PROFILE:** Required by some private colleges as listed on [www.collegeboard.org](http://www.collegeboard.org).

- ★ **Apply:** Starting October 1st. Deadlines vary.
- ★ **Cost:** \$25 for first school; \$16 additional.
- ★ **Info Needed:** Taxes/earnings from current and prior year, investments, benefits received, checking & savings amount, mortgage/rent info, business info, etc.

**Student Aid Report (SAR)**

- ★ A summary of information you reported on your FAFSA; includes your family's Expected Family Contribution (EFC).
- ★ Available a few days after submitting the FAFSA. **Review your SAR to ensure successful FAFSA completion!**
- ★ If necessary, add additional colleges or make corrections.

**Institutional Forms:**

- ★ Some college will require you to fill out their own financial aid forms usually found on the college website or mailed/emailed to you.
- ★ Check with your college(s) to make sure your financial aid file is complete or if they need additional information.

**Verification:**

- ★ Colleges may require additional documents to confirm the information reported on your financial aid forms.
- ★ You may be asked to provide a tax return transcript, proof of citizenship, or documentation of legal guardianship (if applicable).
- ★ Request a tax transcript at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript).
- ★ Your financial aid will be pending until you submit all requested documents by each college's deadline.

**Financial Aid Award:**

- ★ Once you have completed all steps above, the college will provide you with a financial aid award through your student portal or via mail or email.
- ★ The award will show the amount of financial aid you will receive if you attend that college.
- ★ Review all your financial aid awards before submitting your **tuition deposit by May 1st.**



# FAFSA Student Checklist: Information to Collect

To fill out the Free Application for Federal Student Aid (FAFSA), students require certain information from their parent(s). The FAFSA qualifies students for federal, state, and institutional aid. Once you and your parent(s) gather the necessary information, **you will be able to fill out the FAFSA as of October 1, 2016.**

## PARENT(S):

- Parent FSA ID (username and password)\*
- 2015 federal income taxes and W-2 forms
- Have there been income changes since 2015?** (e.g., lost job, decreased work hours, death in family, divorce/separation, recent marriage)  
\_\_\_\_\_
- Month and year parents were married, remarried, separated, divorced or widowed: \_\_\_/\_\_\_\_
- Parent 1: Name \_\_\_\_\_ Date of birth: \_\_\_/\_\_\_/\_\_\_\_  
Social security number: \_\_\_\_\_-\_\_\_\_-\_\_\_\_\_
- Parent 2: Name \_\_\_\_\_ Date of birth: \_\_\_/\_\_\_/\_\_\_\_  
Social security number: \_\_\_\_\_-\_\_\_\_-\_\_\_\_\_
- Total current amount in checking and savings account(s): \_\_\_\_\_

### If applicable, please provide the following:

- Amount of any child support received or paid: \_\_\_\_\_
- Net value of current stocks, bonds, mutual funds, 529 Plan: \_\_\_\_\_
- Net value of investment/rental property (including portions of the home you live in that are rented out): \_\_\_\_\_
- Untaxed privately funded disability benefits: \_\_\_\_\_
- Untaxed workers compensation: \_\_\_\_\_
- Veteran's non-education benefits: \_\_\_\_\_

### Please check if your family receives any of the following:

- SSI/Medicaid  TANF  Food Stamps  WIC  Free/Reduced Price Lunch

## STUDENT:

- 2015 federal income tax form and W-2 forms
- Current amount in checking and savings account(s): \_\_\_\_\_
- Your last name **as it appears** on your social security card: \_\_\_\_\_
- Social security number\* (Be sure it is correct!) \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- Green card/permanent resident number (if applicable)  
A# \_\_\_\_\_
- Amount of any child support received or paid (if applicable): \_\_\_\_\_
- Untaxed privately funded disability benefits (if applicable): \_\_\_\_\_
- Your FSA ID (username and password). If applicable, have your parent bring theirs as well in order to finish FAFSA.**

## Sample W-2

Control number		OMB No. 1545-0048		This information is being furnished to the Internal Revenue Service. If you are required to file a 1042 return, a duplicate copy of this statement may be required on only this return to handle and provide to recipient.	
Employer identification number		1 Wages, tips, other compensation	2 Federal income tax withheld		
Employer's name, address, and ZIP code		3 Social security wages	4 Social security tax withheld		
		5 Medicare wages and tips	6 Medicare tax withheld		
		7 Social security tips	8 Allocated tip		
Employer's social security number		9 Advance EIC payment		10 Dependent care benefits	
Employer's first name and initial		Last name		11 Nonqualified plans	
				12a See instructions for box 12	
				13 401(k) 408(a) 408(b) 457	
				14 Other	
Employer's address and ZIP code					
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax
				20 Locally levied income tax	

Form **W-2** Wage and Tax Statement Department of the Treasury—Internal Revenue Service

## Sample Tax Return

1040 Individual Income Tax Return

Filing Status:  Single  Married filing jointly  Married filing separately  Head of household  Qualifying widow(er)

Exemptions:  Yourself  Spouse  Dependent  Other

Income:  Wages, salaries, tips, etc.  Dividends  Interest  Capital gains  Other

Adjusted Gross Income: \_\_\_\_\_

## Other Important information:

- ★ You may qualify for FREE assistance for filing your taxes. Visit <http://irs.treasury.gov/freetaxprep/> to find FREE tax sites that can help you and your family. It is highly recommended to E-file each year!
- ★ Please be sure that names are being reported exactly as they appear on social security cards (if applicable).
- ★ If your custodial parent is remarried, your stepparent's information must be reported on the FAFSA.