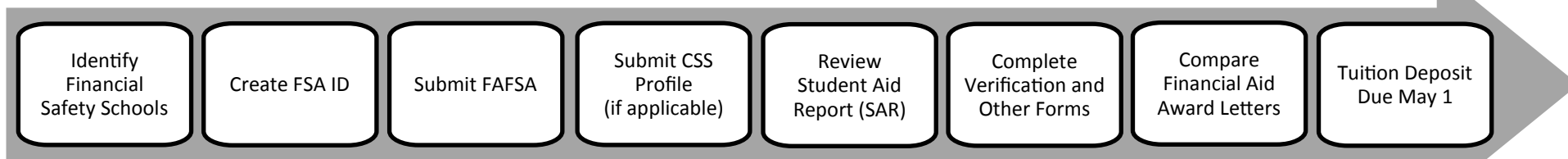


JUNIOR YEAR-SEPTEMBER >> OCTOBER-NOVEMBER >> DECEMBER-FEBRUARY >> MARCH-MAY



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 to create an FSA ID.
- ★ **You will need to create an FSA ID before you can sign and submit your FAFSA.**

Free Application for Federal Student Aid (FAFSA):

- ★ Required by all colleges, universities and technical programs to apply for financial aid. Visit www.fafsa.gov.
- ★ **Apply: Starting October 1.** Other deadlines may apply. Financial aid is first come, first served!
- ★ **Cost: Free!**
- ★ Info needed: Taxes/earnings from 2017, checking & savings amounts, investments, etc.
- ★ Be sure to have an FSA ID for you and your parent (if applicable) in order to complete the FAFSA.
- ★ If possible, use the IRS Data Retrieval Tool to transfer tax information to the FAFSA!

CSS Profile:

- ★ Required by some private colleges as listed on www.collegeboard.org.
- ★ Apply: Starting October 1. Deadlines vary.
- ★ Cost: \$25 for first school; \$16 each additional. Fee waivers are available for eligible students.
- ★ Info needed: Taxes/earnings from 2017 and 2018, benefits received, checking & savings amounts, investments, 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 to view at www.fafsa.gov 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 colleges will require you to fill out their own financial aid forms, usually found on the college website or mailed/mailed to you.
- ★ Check with each college to make sure your financial aid file is complete.

Verification:

- ★ Colleges may require additional documents to confirm the information reported on your financial aid forms.
- ★ For example, you may be asked to complete provide a tax return transcript or proof of citizenship (if applicable).
- ★ Request a free tax transcript at www.irs.gov/individuals/get-transcript.
- ★ Your financial aid will be pending until you submit all requested documents by each college's deadline.
- ★ **Complete verification ASAP!**

Financial Aid Award Letter:

- ★ Once you have been accepted to a college and completed all steps above, the college will send you a financial aid award letter through your student portal or via mail or email.
- ★ The award letter will show the amount of financial aid you will receive if you attend that college.
- ★ **Review all your award letters before submitting a tuition deposit by May 1.**



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 parents gather the necessary information, **you will be able to fill out the FAFSA as of October 1, 2018.**

PARENT(S):

- Parent FSA ID (username and password)
- 2017 federal income taxes and W-2 forms
- Have there been income changes since 2017?** (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 Plans: _____
- 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:

- Medicaid or Supplemental Security Income (SSI) TANF SNAP
- WIC Free or Reduced Price Lunch

STUDENT:

- Your FSA ID (username and password)
- 2017 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): _____

Sample W-2

W-2 Wage and Tax Statement 2017

Department of the Treasury - Internal Revenue Service

Employer's name, address, and ZIP code: _____

Employee's name and address: _____

Employer's identification number (EIN): _____

Employee's social security number: _____

Wages, tips, other compensation: _____

Federal income tax withheld: _____

State income tax: _____

Local income tax: _____

Medicare taxes and Social Security taxes: _____

Retirement plans: _____

Health, dental, vision, and other benefits: _____

Nonqualified plans: _____

Dependent care benefits: _____

Employer's address and ZIP code: _____

State: _____

Local: _____

Country: _____

Sample Tax Return

1040 U.S. Individual Income Tax Return 2017

Department of the Treasury - Internal Revenue Service

Form 1040 (2017)

Personal information: _____

Income: _____

Adjusted Gross Income: _____

Taxable income: _____

Estimated tax: _____

Refund: _____

Overpayment: _____

Signature: _____

Date: _____

Other important information:

- ★ You may qualify for FREE assistance for filing your taxes. Visit <http://irs.treasury.gov/freetaxprep/> to find free tax help near you. It is highly recommended that you and your parent(s) e-file taxes!
- ★ Please be sure to report names 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.