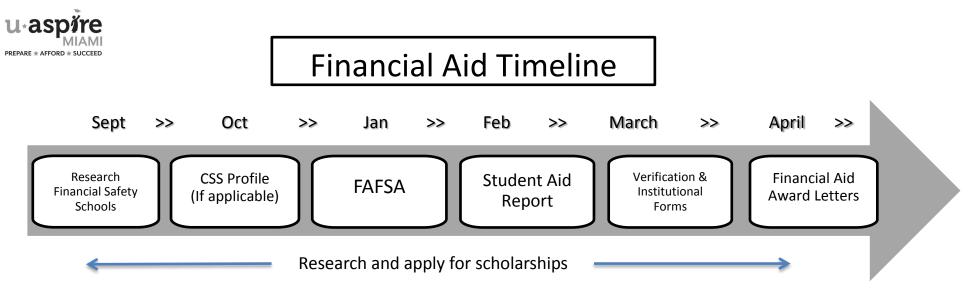# FAFSA Student Checklist: Information to Collect

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, a uAspire Advisor will be able to help you fill out the form. Visit www.uaspire.org to learn more about the financial aid process and how uAspire can help make your college aspirations affordable.

PARENT(S):

☐ Most recent Federal Income Tax form and W-2 Forms
☐ 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 ☐ TANF ☐ Food Stamps ☐ WIC ☐ Free or Reduced Price Lunch

STUDENT:

☐ Most recent 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 you are not a U.S. citizen) A#_____
☐ Amount of any child support received or paid (if applicable): _____
☐ Untaxed privately funded disability benefits (if applicable): _____

Sample W-2

Sample Tax Return

Other Important information:
★ Both you and your parent(s) must file your taxes early and it is highly recommended that you E-File!
★ Please be sure that names are being reported exactly as they appear on social security cards.
★ If your custodial parent is remarried, your stepparent's information must be reported on the FAFSA.
★ Does your parent already have a FAFSA PIN? If so, keep this number in a safe place.

uAspire MIAMI
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Financial Aid Timeline

Sept >> **Oct** >> **Jan** >> **Feb** >> **March** >> **April** >>

| Research Financial Safety Schools | CSS Profile (If applicable) | FAFSA | Student Aid Report | Verification & Institutional Forms | Financial Aid Award Letters |

← Research and apply for scholarships →

CSS/Profile: This form is required by some private colleges as listed on www.collegeboard.org. The CSS/Profile gives colleges an in-depth knowledge of you and your family's financial situation to help them determine how to distribute institutional aid to you.
- ★ **Apply:** October 1st, 2013 or after (check site for individual college deadlines) at www.collegeboard.org/profile
- ★ **Cost:** $25 for 1st school, $16 each additional (fee waivers determined by collegeboard.org)
- ★ **What is needed:** Most recent tax/earnings information for you and your custodial parent(s), investments, checking and savings account amounts, Non-custodial parental information, mortgage/rent info, business info, etc.

Free Application for Federal Student Aid (FAFSA): This form is required by all colleges and many technical programs. The Free Application for Federal Student Aid (FAFSA) is an application for financial aid from the government, and is required in order to be considered for any federal or state issued financial aid, in addition to some institutional funds.
- ★ **Apply:** January 1st, 2014 or after (financial aid is first come, first served!) at www.fafsa.gov
- ★ **Cost:** Free!
- ★ **What is needed:** Most recent tax/earnings information for you and your custodial parent(s), net worth of investments, checking and savings account amounts, etc.

Student Aid Report: This is a summary of information you reported on your FAFSA and will include your family's Expected Family Contribution (EFC). It will be available to view after a few days of submitting the FAFSA. If necessary, you must make corrections, update 2014 tax information via the **IRS Data Retrieval Tool** on the FAFSA, and add colleges. *It is extremely important that you review your SAR with a uAspire Advisor!*

Verification: Colleges may require additional documents to confirm the information you reported on your financial aid forms. For example you may be asked to provide Official Tax Return Transcripts; proof of citizenship, documentation of legal guardianship (if applicable), etc. Your financial aid award will be pending until you submit all requested documentation by the college's deadline. *Complete verification ASAP!*

Institutional Financial Aid Forms: Some colleges will require you to fill out their own financial aid forms. These forms will either be sent to you or found online and they are to be sent directly back to the colleges. If you are unsure whether your college(s) requires additional forms, you may visit the school's website, contact the Financial Aid Office or visit your uAspire Advisor. You should also check with each college to make sure that your financial aid file is complete.

Financial Aid Award Letter: Once you have been accepted to a college, and completed all the steps above, the college will then send you a **financial aid award letter**. The award letter will inform you of the amount of financial aid you will receive if you choose to attend that college. *You should review and compare all award letters before sending off a tuition deposit – see your uAspire Advisor!*

> **Please keep in mind that the financial aid process continues into the summer with other steps that you must complete! uAspire is available over the summer to help you. Please email your uAspire Advisor with any questions.**