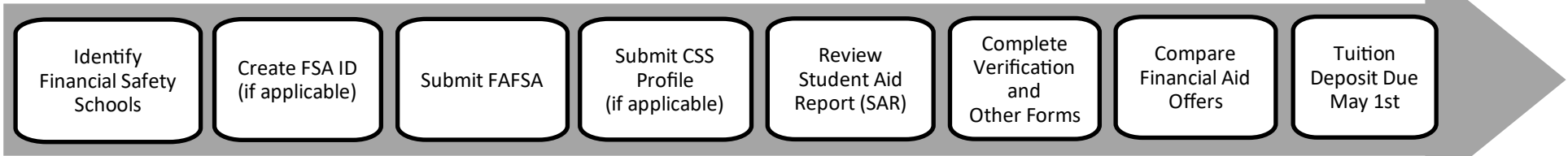


JUNIOR YEAR-SEPTEMBER >> OCTOBER-NOVEMBER >> DECEMBER-FEBRUARY >> MARCH-MAY



**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 [studentaid.gov](http://studentaid.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 2019**, investments, checking & savings amount, etc.
- ★ Be sure to have your FSA ID and Password for student and parent in order to complete the FAFSA
- ★ For FAFSA, use IRS Data Retrieval Tool to link taxes if possible!

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

- ★ **Apply:** Starting October 1st. Deadlines vary.
- ★ **Cost:** \$25 for first school; \$16 additional. Fee waivers available for eligible students.
- ★ **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 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 student
- ★ 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.
- ★ **Complete verification ASAP!**

**Financial Aid Offer:**

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

**\*\*uAspire Advisors are here to assist you with all of these steps. Go to [www.uaspire.org](http://www.uaspire.org) to find out how to set up an appointment\*\***



# 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 1st**. Reach out to your uAspire Advisor for more information!

## PARENT(S):

- Parent FSA ID (username and password)**
- 2019 federal tax return (Form 1040 and any Schedules) and W-2 forms
- Have there been income changes since 2019?** (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  SNAP  WIC  Free/Reduced Price Lunch

## Other Important information:

- ★ You may qualify for FREE assistance for filing your taxes. Visit [irs.treasury.gov/freetaxprep/](https://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

## STUDENT:

- 2019 federal tax return (Form 1040 and any Schedules) 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): \_\_\_\_\_
- FSA ID (username and password) for you and have parent (if applicable) bring theirs as well or we cannot finish FAFSA**

### Sample W-2

22222	a Employee's social security number	OMB No. 1545-0048	
b Employer identification number (EIN)	1 Wages, tips, other compensation	2 Federal income tax withheld	
c Employer's name, address, and ZIP code	3 Social security wages	4 Social security tax withheld	
d Control number	5 Medicare wages and tips	6 Medicare tax withheld	
e Employee's first name and initial	f Social security tips	g Allocated tips	
	8 Verification code	9 Dependent care benefits	
	10 Nonqualified plans	11a	11b
	12a	12b	12c
	13a	13b	13c
	14a	14b	14c
	15a	15b	15c
f Employer's address and ZIP code	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.
	19 Local income tax	20 Unemployment	

### Sample Tax Return

1040 U.S. Individual Income Tax Return 2019

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

Check only if you checked the FSA box, enter the number of FSA. If you checked the FSA box, enter the credit value of the qualifying person in the box. Do not put your maiden name.

Your first name and maiden name: \_\_\_\_\_ Last name: \_\_\_\_\_ Year social security number: \_\_\_\_\_

If joint return, spouse's first name and maiden name: \_\_\_\_\_ Last name: \_\_\_\_\_ Spouse's social security number: \_\_\_\_\_

Home address (number and street), P.O. box, and instructions: \_\_\_\_\_ Apt. no.: \_\_\_\_\_

City, town or post office, state, and ZIP code: \_\_\_\_\_ If you have a foreign address, also complete spouse's home (see instructions).

Foreign country name: \_\_\_\_\_ Foreign postal address: \_\_\_\_\_ Foreign postal code: \_\_\_\_\_

Standard Deduction:  None  Yes (see instructions)  Your spouse is a dependent  Your spouse is a dependent  Spouse benefits on a dependent plan (you were a dual-status alien)

Age/Blindness:  Yes  No (born before January 2, 1955)  No (born before January 2, 1955)  Is blind

Dependents (see instructions): (i) First name: \_\_\_\_\_ (ii) Social security number: \_\_\_\_\_ (iii) Relationship to you: \_\_\_\_\_ (iv) Filing status for relationship: \_\_\_\_\_ (v) Credit for other dependents: \_\_\_\_\_

1 Wages, salaries, tips, etc. (Attach Form(s) W-2) \_\_\_\_\_ 1 Total \_\_\_\_\_

2a Tax-exempt interest \_\_\_\_\_ 2b \_\_\_\_\_

3a Qualified dividends \_\_\_\_\_ 3b \_\_\_\_\_

4a Qualified plan distributions \_\_\_\_\_ 4b \_\_\_\_\_

5a Pensions and annuities \_\_\_\_\_ 5b \_\_\_\_\_

6a Capital gain or loss, Attach Schedule D if required. If required, check box:  6b \_\_\_\_\_

7a Other income from Schedule D (see instructions) \_\_\_\_\_ 7b \_\_\_\_\_

8a Add lines 1, 2a, 3b, 4b, 5b, 6, and 7a. This is your total income \_\_\_\_\_ 8b \_\_\_\_\_

9a Adjustments to income from Schedule A (see instructions) \_\_\_\_\_ 9b \_\_\_\_\_

10 Subtract line 9a from line 8. This is your adjusted gross income \_\_\_\_\_ 10b \_\_\_\_\_

11a Standard deduction or itemized deductions from Schedule A (see instructions) \_\_\_\_\_ 11b \_\_\_\_\_

12 Qualified business income (see instructions) Attach Form 990-B or Form 990-B-ESS \_\_\_\_\_ 12b \_\_\_\_\_

13 Add lines 10b and 11b \_\_\_\_\_ 13b \_\_\_\_\_

14a Taxable income. Subtract line 13b from line 10b. If paid or seen, enter: \_\_\_\_\_ 14b \_\_\_\_\_