

u·aspire

FAFSA CHECKLIST



Follow these steps to fill out the Free Application for Federal Student Aid (FAFSA) or the NYS Dream Act Application, and the NYS Tuition Assistance Program (TAP) each year to apply for most types of financial aid.

1

Determine if you are an independent or dependent student.

Independent student: only report information about yourself and not your parent(s)

Dependent student: report information about yourself and your parent(s) — most common

- You are an **independent student** if at least one of the following is true about you:
 - You will be 24 years of age or older as of Jan 2024
 - You have a child or other dependent for whom you provide the majority of financial support
 - You have a court-ordered legal guardian who is not your biological or adoptive parent
 - You were in foster care at any point after age 13
 - You were a ward of the court at any point after age 13
 - You are married (*but not separated or divorced*)
 - You are homeless or at risk of being homeless
 - Your parents are incarcerated or deceased
 - You are currently on active duty or are a veteran of the U.S. armed forces
- If none of the above apply, you're a **dependent student**. If special circumstances prevent you from providing parental information, contact your college financial aid office.

2

All students need to collect the following information

- Student FSA ID username & password or NYS Dream Act account password
- TAP user ID and pin (also called HESCPIN user ID and pin)
- Picture or copy of your social security card (*if applicable*)
- Picture or copy of your green card (*if applicable*)
- Your 2022 federal tax forms (*if applicable*)
- Your 2022 NYS tax return (*Form IT-201 or IT-203*)
- Total current amount in your checking and savings accounts: \$ _____
- Net worth of your investments: \$ _____
- List of colleges you will apply to or current college you will continue attending



If you're a dependent student, collect this info for your parent(s). If your parents are divorced/separated, include info about the parent who provides the majority of your financial support. If that parent is remarried, include your stepparent.

GENERAL INFORMATION

FSA ID for one or both parents

Picture of parent driver's license or state ID

PARENT 1

PARENT 2

Full name (same as FSA ID): Date

of birth:

Social Security number or ITIN:

Email address:

TAX INFORMATION

2022 federal tax forms (1040 and all schedules)

2022 NYS tax return (Form IT-201 or IT-203)

If 2022 taxes were not filed, what was the reason? _____

FINANCIAL INFORMATION

Total current amount in checking and savings account(s): \$ _____

Net worth (value minus debt) of current stocks, bonds, mutual funds, 529 plans, etc.: \$ _____

Net worth of investment/rental property/rented portion of your home: \$ _____

Net worth of parent-owned business(es) and/or family farm(s): \$ _____

Amount of child support received in the past year for all children: \$ _____

Federal benefits (SNAP, WIC, TANF, etc.) received in 2022 / 2023: _____

**Certain situations may impact how you report information on the FAFSA.
Contact your college(s) if:**

- Your family's income has significantly changed since 2022 or after submitting your FAFSA
- You and your family are homeless or at risk of becoming homeless
- Your parent's marital status has changed since 2022
- You have concerns about your or your parents' citizenship status
- Other major life/financial changes have occurred recently



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