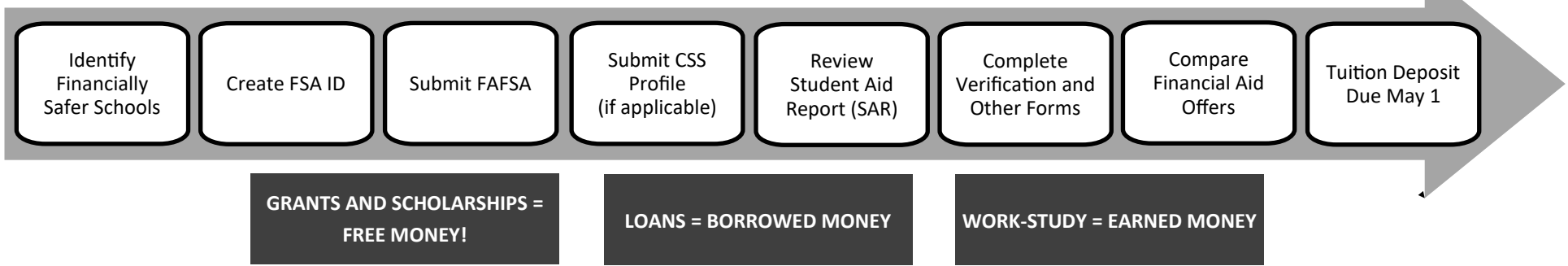


JUNIOR YEAR-SEPTEMBER >> OCTOBER-NOVEMBER >> DECEMBER-FEBRUARY >> MARCH-MAY



**FSA ID:**

- ★ Self-selected username and password that both students and parents must create.
- ★ Visit [studentaid.gov](http://studentaid.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](http://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 2020, 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.
- ★ Use the IRS Data Retrieval Tool (DRT) 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 1. Deadlines vary.
- ★ Cost: \$25 for first school; \$16 each additional. Fee waivers are available for eligible students.
- ★ Info needed: Taxes/earnings from 2020 and 2021, benefits received, checking & savings amounts, investments, mortgage/rent info, business info, etc.

**Student Aid Report (SAR):**

- ★ A summary of the information you reported on your FAFSA; includes your family's Expected Family Contribution (EFC).
- ★ Available to view at [www.fafsa.gov](http://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 provide a tax return transcript or proof of citizenship (if applicable).
- ★ Request a free 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 been accepted to a college and completed all steps above, the college will send you a financial aid offer through your student portal or via mail or email.
- ★ The financial aid offer will show the amount of financial aid you will receive if you attend that college.
- ★ **Review all your financial aid offers 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, 2021.**

## PARENT(S):

- Parent FSA ID (username and password)
- 2020 federal tax return (Form 1040 and any schedules) and W-2 forms
- Have there been income changes since 2020?** (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:

- SSI/Medicaid
- TANF
- SNAP
- WIC
- Free/Reduced Price Lunch

## STUDENT:

- Your FSA ID (username and password)
- 2020 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): \_\_\_\_\_

## Sample W-2

22222	Employee's social security number	OMB No. 1545-0047
1	Wages, tips, other compensation	2 Federal income tax withheld
3	Social security wages	4 Social security tax withheld
5	Medicare wages and tips	6 Medicare tax withheld
7	Social security tips	8 Allocated tips
9	Verification code	10 Dependent care benefits
11	Nonqualified plans	12a
13	Retirement plans	13b
14	Other	15b
16	State income tax	17 Local income tax
18	Local wages, tips, etc.	19 Local income tax
20	State wages, tips, etc.	21 State income tax
22	Local wages, tips, etc.	23 Local income tax
24	State wages, tips, etc.	25 State income tax
26	Local wages, tips, etc.	27 Local income tax
28	State wages, tips, etc.	29 State income tax
30	Local wages, tips, etc.	31 Local income tax

## Sample Tax Return

1040	Department of the Treasury - Internal Revenue Service	OMB No. 1545-0047
20	U.S. Individual Income Tax Return	OMB No. 1545-0047
1	Wages, salaries, tips, etc. Attach Form(s) W-2	2 Tax-exempt interest
3	Qualified dividends	4 Ordinary dividends
5	IRA distributions	6 Taxable amount
7	Capital gain or loss. Attach Schedule D if required. If not required, check here	8 Other income from Schedule 1, line 8
9	Add lines 1, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	10 Adjustments to income
11	Subtract line 10b from line 9. This is your adjusted gross income	12 Standard deduction or itemized deductions from Schedule A
13	Qualified business income deduction. Attach Form 9999 or Form 9995-A	14 Add lines 12 and 13
15	Taxable income. Subtract line 14 from line 11. If zero or less, enter -0-	16

## 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 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.