



# 2023-2024 Financial aid application worksheet

The Free Application for Federal Student Aid (FAFSA) is the doorway to all federal financial aid, including loans, grants and work-study opportunities. Most states and colleges also use FAFSA submissions to determine financial aid. This worksheet will help you gather the information necessary to complete the FAFSA.

## Your information

Legal first name: \_\_\_\_\_

Legal last name: \_\_\_\_\_ Middle initial: \_\_\_\_\_

Social Security number (SSN)\*: \_\_\_\_\_ Driver's license number (if you have one): \_\_\_\_\_

Personal email (non-school): \_\_\_\_\_

Schools you want to send your financial aid information to (list up to 10 schools):

- 1 \_\_\_\_\_ 2 \_\_\_\_\_
- 3 \_\_\_\_\_ 4 \_\_\_\_\_
- 5 \_\_\_\_\_ 6 \_\_\_\_\_
- 7 \_\_\_\_\_ 8 \_\_\_\_\_
- 9 \_\_\_\_\_ 10 \_\_\_\_\_

## Will you need to provide parental information?

If you check **any** of the following boxes, you **will not** have to provide parental information.  
If you check **none** of the following boxes, you **will** be asked to provide parental information.

- I was born before January 1, 2000
- I am serving on active duty in the U.S. Armed Forces
- I am a veteran of the U.S. Armed Forces
- I was in foster care at any point since turning age 13
- I am currently or I was an emancipated minor
- I am married
- I now have or will have children for whom I will provide more than half of their support between July 1, 2023 and June 30, 2024
- I have dependents (other than children or my spouse) who live with me and I provide more than half of their support
- I will be working on a master's or doctorate program (e.g., MA, MBA, MD, JD, PhD, EdD, graduate certificate)
- Since I turned age 13, both of my parents were deceased
- I was a dependent or ward of the court at any point since turning age 13
- I am currently or I was in legal guardianship
- I am currently, or at risk of, experiencing homelessness

\*Students without SSNs who need to submit the FAFSA may download and print it at <https://studentaid.gov/apply-for-aid/fafsa/filling-out> under FAFSA Filing Options. The mailing address is on the form.



## Parent information

### Providing Parent 1 information?

*You will need:*

Parent 1 (father/mother/stepparent) SSN\*: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Parent 1 (father/mother/stepparent) legal last name, first initial: \_\_\_\_\_

Parent 1 (father/mother/stepparent) date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Did Parent 1 file a federal income tax return?  Yes  No

If they filed a return, what was their filing status?  Single  Married-filing jointly

Married-filing separately  Head of household  Qualifying widow(er) with dependent child

### Providing Parent 2 information?

*You will need:*

Parent 2 (father/mother/stepparent) SSN\*: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Parent 2 (father/mother/stepparent) legal last name, first initial: \_\_\_\_\_

Parent 2 (father/mother/stepparent) date of birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Did Parent 2 file a federal income tax return?  Yes  No

If they filed a return, what was their filing status?  Single  Married-filing jointly

Married-filing separately  Head of household  Qualifying widow(er) with dependent child

### Other information

Month and year my parents were married, separated, divorced or widowed (circle one): \_\_\_\_\_

How many people are in your parents' household? \_\_\_\_\_

Of these people, how many will be college students between July 1, 2023 and June 30, 2024? \_\_\_\_\_

**At any time during 2021 or 2022, did you, your parents, or anyone in your parents' household receive benefits from any of the federal programs listed?**

Medicaid or Supplemental Security Income (SSI)

Free or Reduced Price School Lunch

Supplemental Nutrition Assistance Program (SNAP)

Temporary Assistance for Needy Families (TANF)

Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

**Did your parents file or will they file a 2021 income tax return?**

My parents have already completed a tax return

My parents will file, but have not yet completed a tax return

My parents are not going to file an income tax return

**What was your parents' adjusted gross income for 2021? \$** \_\_\_\_\_

*Skip this question if your parents did not file taxes.*

**How much did your parents pay in federal income tax for 2021? \$** \_\_\_\_\_

Not sure whom to report as a parent?

Visit <https://studentaid.gov/help/who-is-parent> OR call 800-433-3243.

Not sure if you are a dependent student?

Go to <https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency>.

Did you know?

If your parents filed a tax return with the IRS, they may be eligible to use the IRS Data Retrieval Tool, which is the easiest way to provide accurate tax information. With just a few simple steps, they may be able to securely transfer their tax return information into the electronic FAFSA. For more information, visit <https://studentaid.gov/help-center/answers/article/what-is-irs-drt>.

The following questions ask about earnings (wages, salaries, tips, etc.) in 2021.

Answer the question whether or not a tax return was filed.

How much did Parent 1 (father/mother/stepparent) earn from working in 2021?

\$ \_\_\_\_\_

How much did Parent 2 (father/mother/stepparent) earn from working in 2021 (if applicable)?

\$ \_\_\_\_\_

Did your parents have any of the following items in 2021?

Check all that apply. Once online, you may be asked to report amounts paid or received by your parents.

#### Additional financial information\*

- American Opportunity Tax Credit and/or Lifetime Learning Tax Credit
- Child support paid
- Taxable earnings from work-study, assistantships or fellowships
- Taxable college grant and scholarship aid reported to the IRS as income
- Combat pay or special combat pay
- Cooperative education program earnings

#### Untaxed income\*

- Payments to tax-deferred pension and retirement savings plans
- Child support received
- IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans Form 1040 Schedule 1
- Tax-exempt interest income
- Untaxed portions of IRA distributions and pensions (exclude rollovers)
- Housing, food and other living allowances paid to members of the military, clergy and others
- Veterans noneducation benefits
- Other untaxed income not reported, such as workers' compensation or disability benefits

#### As of today

What is your parents' total current balance of cash, savings and checking accounts? \$ \_\_\_\_\_

*Don't include student financial aid.*

What is the net worth of your parents' investments, including real estate? \$ \_\_\_\_\_

*Don't include the home in which your parents live or the amount in your parents' retirement accounts.*

What is the net worth of your parents' businesses and/or investment farms? \$ \_\_\_\_\_

*Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.*

#### Did you know?

You should file your FAFSA as soon as possible on or after October 1 regardless of whether or not you have been accepted to college.

#### Need help completing the FAFSA?

- Contact Federal Student Aid by phone, email or live chat (<https://studentaid.gov/help-center/contact>).
- Contact your colleges' financial aid offices.
- Check with your high school to see if there is a local FAFSA completion event you can attend.
- Contact your local The College Place Director for assistance at [www.ecmc.org/TCP](http://www.ecmc.org/TCP).

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\*If the answer to any of these questions is yes, you will need to provide the total amount for 2021. For example, if your parent received \$380 in child support each month, you will list \$4,560 for 2021.

## Student information

Did you file or will you file a 2021 income tax return?

- I have already completed a tax return
- I will file, but have not yet completed a tax return
- I'm not going to file an income tax return

What was your (the student's) adjusted gross income for 2021? \$ \_\_\_\_\_

*Skip this question if you did not file taxes.*

How much did you pay in federal income tax for 2021? \$ \_\_\_\_\_

The following question asks about earnings (wages, salaries, tips, etc.) in 2021.

*Answer the question whether or not a tax return was filed.*

How much did you earn from working in 2021? \$ \_\_\_\_\_

### As of today

What is your total current balance of cash, savings and checking accounts? \$ \_\_\_\_\_

*Don't include student financial aid.*

What is the net worth of your investments, including real estate? \$ \_\_\_\_\_

*Don't include the home in which you live or the amount in your retirement accounts.*

What is the net worth of your businesses and/or investment farms? \$ \_\_\_\_\_

*Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.*

### Student citizenship status

*Check one of the following.*

- U.S. citizen (U.S. national)
- Neither citizen nor eligible noncitizen\*
- Eligible noncitizen (enter your Alien Registration Number below)

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Ready to complete the FAFSA? Go to <https://studentaid.gov/h/apply-for-aid/fafsa>.

## Did you know?

If you file a tax return with the IRS, you may be eligible to use the IRS Data Retrieval Tool, which is the easiest way to provide accurate information. With just a few simple steps, you may be able to securely transfer your tax return information into the electronic FAFSA. For more information, visit <https://studentaid.gov/help-center/answers/article/what-is-irs-drt>.

## Create your FSA ID

Completing your FAFSA online is the fastest and easiest way to file your FAFSA. In order to do so, you and your parent will each need an FSA ID (if you are dependent). For more information and to create an FSA ID, go to <https://studentaid.gov/fsa-id/create-account/launch>.

My FSA ID username:

\_\_\_\_\_

My FSA ID password:

\_\_\_\_\_

My parent's FSA ID username:

\_\_\_\_\_

My parent's FSA ID password:

\_\_\_\_\_

\*California students, do not submit the FAFSA; instead submit the California Dream Act Application (CADAA) at <https://dream.csac.ca.gov/>

\*Colorado students, do not submit the FAFSA; instead submit the Colorado College Opportunity Fund at <https://cof.college-assist.org> and the Colorado Application for State Financial Aid (CASFA) at <https://cdhe.colorado.gov/students/preparing-for-college/colorado-application-for-state-financial-aid>

\*Connecticut students, do not submit the FAFSA; CSCU students go to [www.ct.edu/admission/finaid#undocumented](http://www.ct.edu/admission/finaid#undocumented); UConn students go to [https://financialaid.uconn.edu/undocumented\\_students](https://financialaid.uconn.edu/undocumented_students)

\*Minnesota students, do not submit the FAFSA; instead submit the Minnesota Dream Act Application at [www.ohe.state.mn.us/mPg.cfm?pageID=2056](http://www.ohe.state.mn.us/mPg.cfm?pageID=2056)

\*Oregon students, do not submit the FAFSA; instead submit the Oregon Student Aid Application (ORSAA) at <https://oregonstudentaid.gov/afsa-orsaa.aspx>

\*Students in all other states, check with your high school counselor or financial aid office to see whether completing the FAFSA form is the way to apply for state and college student aid