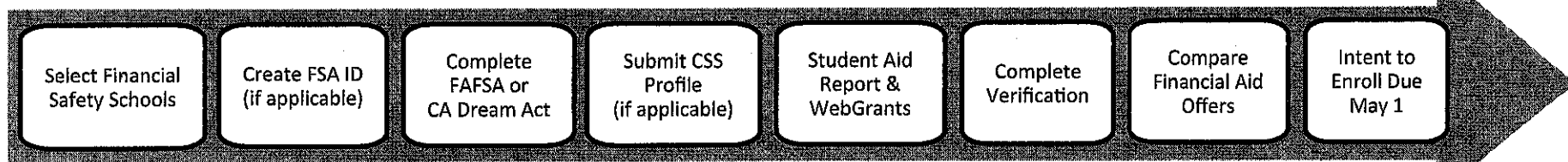


# Financial Aid Timeline

Research and apply for scholarships throughout the year! And remember, the financial aid process continues in the summer!!

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



**GRANTS AND SCHOLARSHIPS = FREE MONEY!**

**LOANS = BORROWED MONEY**

**WORK-STUDY = EARNED MONEY**

**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.

**Free Application For Federal Student Aid (FAFSA):** Required by all colleges, universities, and technical programs. Visit [www.fafsa.gov](http://www.fafsa.gov).

**CA Dream Act:** Allows undocumented students who qualify for AB540 to apply for CA state and institutional aid. Visit [www.caldreamact.org](http://www.caldreamact.org).

- ★ **Apply:** Starting October 1st. Due March 2nd for state aid. Other deadlines may apply. Financial aid process is first come, first served!
- ★ **Cost:** Free!
- ★ **Info Needed:** SS# if applicable, taxes/earnings from 2018, investments, checking & savings amount, etc.
- ★ For FAFSA, use IRS Data Retrieval Tool to link taxes if possible!

**FSA ID:**

- ★ Self-selected username and password that both students and parents must create
- ★ Visit [fsaid.ed.gov](http://fsaid.ed.gov) to create a username and password to be able to complete the FAFSA.
- ★ For CA Dream Act, visit [caldreamact.org](http://caldreamact.org) to create username and password

**Student Aid Report:**

- ★ A summary of information you reported on your FAFSA or CA Dream Act; includes your family's Expected Family Contribution (EFC).
- ★ Available a few days after submitting FAFSA/Dream Act. **Review your SAR to ensure successful FAFSA/Dream Act completion!**
- ★ If necessary, add additional colleges or make corrections.

**WebGrants for Students:**

- ★ To check your **Cal Grant** status, create an account at [webgrants4students.org](http://webgrants4students.org)
- ★ Cal Grants are need-based and require a minimum of a 2.0 GPA, with additional funds for students with a 3.0 or higher.
- ★ In June, use WebGrants to confirm your intended college and graduation status.

**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.
- ★ 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 **intent to enroll by May 1st.**



# 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, 2018.**

2019

### PARENT(S):

- Parent FSA ID (username and password)
- 2018 federal income taxes and W-2 forms
- Have there been income changes since 2018?** (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:

- Medicaid or Supplemental Security Income (SSI)     TANF     SNAP
- WIC     Free or Reduced Price Lunch

### STUDENT:

- Your FSA ID (username and password)
- 2018 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 applicable)  
A# \_\_\_\_\_
- Amount of any child support received or paid (if applicable): \_\_\_\_\_
- Untaxed privately funded disability benefits (if applicable): \_\_\_\_\_

Sample W-2

W-2 Wage and Tax Statement 2018

Employee's Social Security Number: 123456789  
Employee's State ID Number: 123456789  
Employee's Name: JOHN DOE  
Employer's Name: ABC COMPANY  
Employer's Address: 123 MAIN ST, ANYTOWN, CA 94301  
Employer's EIN: 12-3456789

Box 1: Wages, tips, other compensation: \$12,345  
Box 2: Federal income tax withheld: \$1,234  
Box 3: Social Security wages: \$12,345  
Box 4: Social Security tax withheld: \$765.30  
Box 5: Medicare wages and tips: \$12,345  
Box 6: Medicare tax withheld: \$179.23  
Box 7: Social Security tips: \$0  
Box 8: Uncollected Social Security tax on tips: \$0  
Box 9: Allocated tips: \$0  
Box 10: Dependent care benefits: \$0  
Box 11: Dependent care expenses: \$0  
Box 12: Other income: \$0  
Box 13: Other benefits: \$0  
Box 14: Other deductions: \$0  
Box 15: State tax withheld: \$0  
Box 16: State tax credits: \$0  
Box 17: State tax payments: \$0  
Box 18: State tax refund: \$0  
Box 19: State tax credit: \$0  
Box 20: State tax payments: \$0  
Box 21: State tax refund: \$0  
Box 22: State tax credit: \$0  
Box 23: State tax payments: \$0  
Box 24: State tax refund: \$0  
Box 25: State tax credit: \$0  
Box 26: State tax payments: \$0  
Box 27: State tax refund: \$0  
Box 28: State tax credit: \$0  
Box 29: State tax payments: \$0  
Box 30: State tax refund: \$0  
Box 31: State tax credit: \$0  
Box 32: State tax payments: \$0  
Box 33: State tax refund: \$0  
Box 34: State tax credit: \$0  
Box 35: State tax payments: \$0  
Box 36: State tax refund: \$0  
Box 37: State tax credit: \$0  
Box 38: State tax payments: \$0  
Box 39: State tax refund: \$0  
Box 40: State tax credit: \$0  
Box 41: State tax payments: \$0  
Box 42: State tax refund: \$0  
Box 43: State tax credit: \$0  
Box 44: State tax payments: \$0  
Box 45: State tax refund: \$0  
Box 46: State tax credit: \$0  
Box 47: State tax payments: \$0  
Box 48: State tax refund: \$0  
Box 49: State tax credit: \$0  
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Box 52: State tax credit: \$0  
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Box 88: State tax credit: \$0  
Box 89: State tax payments: \$0  
Box 90: State tax refund: \$0  
Box 91: State tax credit: \$0  
Box 92: State tax payments: \$0  
Box 93: State tax refund: \$0  
Box 94: State tax credit: \$0  
Box 95: State tax payments: \$0  
Box 96: State tax refund: \$0  
Box 97: State tax credit: \$0  
Box 98: State tax payments: \$0  
Box 99: State tax refund: \$0  
Box 100: State tax credit: \$0

Sample Tax Return

1040 U.S. Individual Income Tax Return

1. Name of taxpayer: JOHN DOE  
2. Address: 123 MAIN ST, ANYTOWN, CA 94301  
3. Social Security Number: 123456789  
4. Filing Status: Single  
5. Taxable Income: \$12,345  
6. Total Tax: \$1,234  
7. Refund: \$0  
8. Other Information: \$0

### Other important information:

- ★ You may qualify for FREE assistance for filing your taxes. Visit <http://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.