COMPLETING THE FAFSA

It's important to gather all the necessary information and materials beforehand. Trust us, if you do have the necessary information on hand, filling out the form will become much simpler. Depending on your circumstances (when you filed taxes or what tax form was used), you may or may **not need ALL** the following information or documents as you fill out the FAFSA.

Here's what you'll need:

☐ Your Social Security card and driver's license, and/or alien registration card if you are not a US citizen.

☐ Your most recent federal income tax returns, W-2s, and other records of money earned. (Note: You may be able to transfer your federal tax return information into your FAFSA using the IRS Data Retrieval Tool.

☐ If you're a dependent (and you are, unless declared otherwise) on your parents' income tax returns, W-2 forms and 1040 forms. If you or your parents have not completed your taxes yet, you can estimate your income and other tax return information, and then correct your application after you have filed your taxes.

☐ Records and documentation of other untaxed income received such as welfare benefits, Social Security income, veteran's benefits, military or clergy allowances (if applicable).

☐ Any additional applicable financial information, such as taxable work-study, assistantships, fellowships, grants and scholarship aid reported to the IRS, combat pay or special combat pay and cooperative education program earnings.

☐ Records of any additional untaxed income

Examples include: child support received, veterans' non-education benefits, money received or paid on your behalf, etc.

☐ Current bank and brokerage account statements, including records of stocks, bonds, mutual funds and other investments (if applicable).

☐ Business or investment farm records (if applicable).

☐ Records relating to any unusual family financial circumstances, such as anything that changed from last year or anything that distinguishes the family from the typical family in terms of unusual marital situations, living situations, separations, etc.

Examples include: high unreimbursed medical and/or dental expenses, unusually high dependent care costs (e.g., for a special needs child or an elderly parent), death, divorce, salary reductions, job loss and private K-12 tuition.

☐ Title IV Institution Codes for each school you are applying to. You can get this code from the school (some have them listed on their web sites) or you can use [FinAid's Title IV School Code Database](#).

☐ When filling out and submitting your FAFSA electronically, you'll need a [FAFSA ID](#) to sign the form. If you don't have one, you can [create a FAFSA ID online](#).

If you are applying as a dependent- again, you are unless declared otherwise- one parent is required to sign as well. To electronically fill out your FAFSA online, your parent should also apply for a FAFSA ID at the same site.

☐ Download the [FAFSA worksheet](#) during your preparation process, to doubly ensure you have all of the information you need.

☐ Utilize the [IRS Data Retrieval Tool](#), which allows applicants who have already filed their federal income tax returns to prefill the answers to some of the difficult FAFSA questions by transferring the necessary data directly from federal income tax returns.

☐ If you are a man, 25 years or younger, you must be registered with Selective Service.

According to the [Selective Service System website](#), "men, born after December 31, 1959, who aren't registered with Selective Service won't qualify for Federal student loans or grant programs. This includes Federal Pell Grants, Federal Supplemental Educational Opportunity Grants (FSEOG), Direct Stafford Loans/Plus Loans, National Direct Student Loans, and College Work Study." Make sure to ensure your eligibility by following the guidelines detailed on the [Selective Service System website](#)!

Additional Advice:

We'd advise you to gather your materials and fill out your forms sooner than later because the entire process can take a while. Putting off your financial aid is not something you want to do!

Once you complete your FAFSA, save copies of your completed FAFSA form, along with copies of all the information you gathered in order to fill it out.

Make sure to keep all documents in a safe place – you never know when you'll need to reference them. It's also a way to prove that you've submitted the form on time, since no late applications are accepted!

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