



2020-2021 Financial Aid Checklist

To complete the FAFSA, you need the following:

- Create a FSA ID (Federal Student Aid ID) – Go to <https://fsaid.ed.gov> to obtain**
 - **Student and a Parent need a FSA ID of their own**
- Collect all necessary documents for completing the FAFSA (Free Application for Federal Student Aid)**
 - Your Social Security Number
 - Your Driver's License Number (if you have one)
 - 2018 Tax Documents if the following apply:
 - Student/Parent filed 2018 Federal Taxes as Married/Filing Separately
 - Student/Parent filed Form 1040X (amended income tax return)
 - Student/Parent filed a foreign tax return
 - Student/Parent are victims of identity theft
 - Student/Parent Untaxed Income information such as:
 - Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).
 - IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 - line 28 + line 32 or 1040A - line 17.
 - Child support received for any of your children. Don't include foster care or adoption payments.
 - Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b.
 - Untaxed portions of IRA distributions from IRS Form 1040-lines (15a minus 15b) or 1040A-lines (11a minus 11b). Exclude rollovers.
 - Untaxed portions of pensions from IRS Form 1040-lines (16a minus 16b) or 1040A-lines (12a minus 12b). Exclude rollovers.
 - Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.
 - Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
 - Other untaxed income such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040-line 25.
 - Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.
 - Information about student/parent investments and bank account balances:
 - What is student's total current balance of cash, savings, and checking accounts?
 - **Don't include** student financial aid.

We look forward to assisting you!

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