FAFSA Checklist: What You Need to Complete the Form

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Simplify completing or renewing your FAFSA by having these items ready before October 1.

Trust us, if you do have the necessary information on hand, filling out the form will become much simpler.

The FAFSA (Free Application for Federal Student Aid): you may have heard about it before. It's the application you must fill out in order to qualify for any and all financial aid. Looking for federal grants? You need to complete the FAFSA. Searching for state aid? You need to complete the FAFSA? Hoping for financial help from your college choice? You need to complete the FAFSA. So, what do you need to know about the FAFSA? First, you need to know that we've got you covered. It's our mission to help students pay for college and providing FAFSA help is one way we do that. Secondly, you need to prepare to fill out the FAFSA application. It's important to familiarize yourself with the following topics: • What's the FAFSA? And Why You Should Care • Why Should I Complete the FAFSA? Finally, you need to know when to complete the FAFSA. **The form is available on October 1**, which means that it's time to gather up everything you need in order to successfully complete the form. Depending on your circumstances (when you filed taxes or what tax form was used), you may or may not need the following information or documents as you fill out the FAFSA.

Your FAFSA Checklist:

Your **Social Security card and driver's license**, and/or alien registration card if you are not a US citizen. Your **2021 federal income tax returns** (you don't have to wait - you can use the most recent returns you have from last year), **W-2s, and other records of money earned**. (The IRS Data Retrieval Tool can help you transfer your federal tax return information right into your FAFSA form.) Your **parents' income tax returns, W-2 forms and 1040 forms** if you are a dependent (and you are unless declared otherwise). 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 nontaxable 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 nontaxable 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**. This can include anything that changed from last year or anything that separates your family from a "typical" family in terms of unusual marital situations, living situations, separations, etc. Examples include: high non-reimbursed 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 **your FSA ID** to sign the form. If you don't have one, you can create a FSA ID online. If you are applying as a dependent - again, you are a dependent 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 Department of Education's **2023-24 FAFSA information worksheet** during your preparation process, to doubly ensure you have all of the information you need. Use the **IRS Data Retrieval Tool**. If you've already filed your federal income tax returns, it will pre-fill the answers to some of the more difficult FAFSA questions by transferring the necessary data directly from federal income tax returns.

Additional Financial Aid and FAFSA Advice:

We'd advise you to gather your materials and fill out your forms sooner rather than later because the entire process can take a while. Plus, many states award financial aid on a first-come, first-serve basis (even though the federal FAFSA deadline is June 30), meaning you may get more aid if you file in October versus April. 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!