

FINANCIAL AID DOCUMENT CHECKLIST

FAFSA Checklist 2020–2021 - TO APPLY ONLINE: FAFSA.ED.GOV - 800.4FEDAID

FAFSA / TASFA

- Your Social Security Number. Be sure it is correct!
 - TASFA applicants – if you were issued SSN (e.g. DACA)
- Your driver's license (if any)
- Dates of birth for student applicant and parents
- 2018 W-2 Forms and other records of money earned
- Parent and student (if filed) 2018 Federal Income Tax Return: IRS Tax Form 1040, 1040A, or 1040EZ
- Untaxed income records: Child support received, Section 8 Housing supplement, SNAP/Food Stamps/TANF/SSI/WIC, Worker's Compensation income, Veteran benefits
- Current bank statements
- Your current business and investment mortgage information, business and farm records, stock, bond and other investment records (assess net value)
- Your alien registration or permanent resident card (if you are not a U.S. citizen)
- Set-up FSA ID for student and parent (FAFSA applicants only) – <https://fsaid.ed.gov/>
- Your list of up to 10 colleges

CSS Profile

- All from the previous page, plus...
- Current homestead mortgage balance, year home was purchased, current market value of homestead property, purchase price of home, monthly mortgage (same information is needed for investment properties)
- Year, make, model of all vehicles in your (filing parents' names) –purchase amount, current debt, year purchased
- All Schedule of Parent and Student 2018 1040 tax return –Schedule A, B, C, E; K-1s; 1065, 1120(S)

- Non-Custodial Parent information (if biological parents are divorce or separated) –same as above; if accessible

Dependent vs Independent Student

Are you dependent or independent?

- Were you born before January 1, 1995?
- Are you married?
- At the beginning of the 2020–2021 school year, will you be working on a master’s or doctoral program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?
- Are you on active duty in the U.S. Armed Forces for purposes other than training?
- Are you a veteran of the U.S. Armed Forces?
- Do you have or will you have children who will receive more than half of their support from you?
- Do you have dependents (other than your children or spouse) who live with you and who will receive more than half of their support from you, through June 30, 2020?
- At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?
- Have you been declared an emancipated minor by a court in your state of legal residence?
- Have you been placed in a legal guardianship by a court in your state of legal residence?
- At any time after June 30, 2019, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?
- At any time after June 30, 2019, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?
- At any time on or after July 1, 2019 did the director of a runaway or homeless youth basic center or transitional living program determine that you were an

unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?

Household Size

To determine your household size, include:

- Yourself (and if married, your spouse);
- Your Parents;
- The number of children (even if they do not live with you) who will receive more than half of their support from you (and if married, your spouse) between July 1, 2020 and June 30, 2021. You may include any unborn children if they will be born during the school year; and
- The number of people (not your children or spouse) who live with you and receive more than half of their support from you, and will continue to receive more than half of their support from you between July 1, 2020 and June 30, 2021.