



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 1st**. Reach out to your uAspire Advisor for more information!

PARENT(S):

- Parent FSA ID (username and password)**
- 2021 federal tax return (Form 1040 and any Schedules) and W-2 forms
- Have there been income changes since 2021?** (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 Plan: _____
- 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:

- SSI/Medicaid TANF SNAP WIC Free/Reduced Price Lunch

Other Important information:

- ★ You may qualify for FREE assistance for filing your taxes. Visit <https://irs.treasury.gov/freetaxprep/> to find FREE tax sites that can help you and your family. It is highly recommended to E-file each year!
- ★ Please be sure that names are being reported 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

STUDENT:

- 2021 federal tax return (Form 1040 and any Schedules) 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): _____
- FSA ID (username and password) for you and have parent (if applicable) bring theirs as well or we cannot finish FAFSA**

Sample W-2

22222	Employer's social security number	OMB No. 1545-0048
b	Employer identification number (EIN)	1 Wages, tips, other compensation 2 Federal income tax withheld
c	Employer's name, address, and ZIP code	3 Social security wages 4 Social security tax withheld 5 Medicare wages and tips 6 Medicare tax withheld 7 Social security tips 8 Allocated tips
d	Control number	9 Verification code 10 Dependent care benefits
e	Employee's first name and initial Last name	11 Nonqualified plans 12a 12b 12c 12d 12e 12f 12g 12h 12i 12j 12k 12l 12m 12n 12o 12p 12q 12r 12s 12t 12u 12v 12w 12x 12y 12z
f	Employee's address and ZIP code	13 State wages, tips, etc. 14 Other 15 Local income tax 16 State income tax 17 Local income tax 18 Local wages, tips, etc. 19 Local income tax 20 Unemployment tax

Sample Tax Return

1040	Department of the Treasury - Internal Revenue Service	OMB No. 1545-0047
2021	U.S. Individual Income Tax Return	2021
Filing Status	Single <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately (MFS) <input type="checkbox"/> Head of household (HOH) <input type="checkbox"/> Qualifying widow(er) (QW)	Check only if you checked the MFS box, enter the name of your spouse. If you checked the HOH or QW box, enter the child's name (the qualifying person is a child but not your dependent)
Standard Deduction	Standard Deduction <input type="checkbox"/> Spouse itemizes on a separate return or you were a dual-status alien	Standard Deduction <input type="checkbox"/> Spouse itemizes on a separate return or you were a dual-status alien
Dependents	Dependents (see instructions)	Dependents (see instructions)
1	Wages, salaries, tips, etc. (see instructions)	1
2	Qualified dividends	2
3	Ordinary dividends	3
4	IRA distributions	4
5	Taxable amount	5
6	Capital gain or loss (see instructions)	6
7	Other income (see instructions)	7
8	Adjusted gross income (AGI)	8
9	Standard deduction (see instructions)	9
10	Taxable income	10
11	Estimated tax payments and refund	11
12	Refund	12
13	Additional tax	13
14	Total tax	14
15	Payments (including refund)	15
16	Amount due	16