



FAFSA/TAP 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 and password***
- 2021 federal tax return (Form 1040 and any Schedules) and W-2 Forms
- 2021 NYS Tax return (Form IT-201 or IT-203)*
If filing the NYS Dream Act application & parent(s) live outside of NYS —out-of-state tax returns may be required
- 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://growingupnyc.cityofnewyork.us/programs/nyc-free-tax-prep/> 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 & NYS TAP Application

STUDENT:

- 2021 federal tax return (Form 1040 and any Schedules) and W-2 forms
- 2021 NYS tax return (Form IT-201 or IT-203)*
- 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**

*May or may not be required for NYS Dream Act Application

Sample W-2

Sample Federal Tax Return

Sample NYS Tax Return