

## 2011-2012 FAFSA Checklist

### What is FAFSA?

FAFSA stands for the Free Application for Federal Student Aid (FAFSA). If you plan on attending a college, university, or other post-secondary program and need financial assistance, you must submit a FAFSA form to apply for aid from the federal government (i.e. Pell Grant, Perkins Loan, Stafford Loan, work-study, etc.). Furthermore, all state and most school funded programs (scholarships, grants, etc.) use the FAFSA form in determining whether to give a student more aid in addition to the federal money awarded. The Benefit Bank (TBB) can help you fill out and file this form.

### What are the options for filing a FAFSA form?

There are two ways in which you can file your FAFSA form: mailing in a paper form or electronically submitting your form. The Benefit Bank can help you file your FAFSA form using both methods. If you plan on filing your FAFSA electronically, there are two ways to sign the form: a signature page or PIN. ***NOTE: We strongly recommend that you obtain a PIN, if you don't have one already, before using TBB since processing time for your FAFSA application will be faster with a PIN. You can obtain a PIN instantly by going to [www.pin.ed.gov](http://www.pin.ed.gov)***

### What do you need to fill out the form?

The FAFSA form asks various types of questions about you, your parents, your spouse, and your dependents (if any). Below is a list of documents you will need to bring to TBB **OR** information about you or your parents that you will need to know to fill out your FAFSA form:

- ☐ ID such as SSN, driver's license (if any), alien registration number (if a non-citizen)
- ☐ Marital status, such as date of divorce/separation
- ☐ Residency status, such as address, date moved into the state, and whether you are an emancipated minor, in foster care, or homeless. If you are not a U.S. citizen, you should bring your alien registration or permanent resident card.
- ☐ Dates of conviction for possessing/selling illegal drugs OR removal from your record for such convictions
- ☐ Level of education, such as degrees or certifications received
- ☐ Records of earned income, such as W-2 forms
- ☐ Tax returns for you and your parents:
  - IRS Form 1040, 1040A, or 1040EZ - ***NOTE: You can use The Benefit Bank to file your Form 1040. By filing your return with TBB you will answer fewer questions when you fill out the FAFSA form since our program will use the information you give us.***
  - Foreign tax forms; OR
  - Forms from Puerto Rico, Guam, American Samoa, U.S. Virgin Islands, Marshall Islands, Federal States of Micronesia, or Palau
- ☐ Statements showing the value of cash, savings, and checking accounts
- ☐ Documents showing the value of investments, such as real estate (not primary home), certificate of deposits, money market funds, mutual funds, stocks, bonds, education savings account (529 plan or Coverdell), trust, and other custodial accounts (UTMA or UGMA) ***NOTE: Investments do not include life insurance plans or retirement plans (pensions, annuities, non-education IRAs, Keogh plans, etc.)***
- ☐ Records of untaxed income such as veteran's non-education benefits (disability, death pension, or dependency & indemnity compensation), child support received, and worker's compensation. ***NOTE: Untaxed income does not include items such as Supplemental Social Security (SSI), untaxed Social Security benefits (reported on IRS Form 1040), governmental assistance (TANF or GA, but NOT food assistance [food stamps, SNAP, or another program], subsidized housing, or LIHEAP), or benefits from cafeteria plans (also known as flexible spending accounts).***