

## 2015-2016 Award Year FAFSA Checklist

### What is FAFSA?

FAFSA stands for the Free Application for Federal Student Aid. 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 (such as Pell Grants, Perkins Loans, Stafford Loans, or work-study). Furthermore, all state and most school funded programs (such as scholarships or grants) use the FAFSA form in determining whether to give a student more aid in addition to the federal money awarded. The Benefit Bank can help you fill out and submit this form.

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

You can submit your FAFSA form in one of two ways: mailing in a paper form or electronically submitting it through FAFSA on the Web at [fafsa.gov](http://fafsa.gov). If you choose not to submit a paper form, The Benefit Bank can help you complete a FAFSA worksheet that will assist you in completing the FAFSA on the Web application.

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

The FAFSA form asks different questions about you, your parents, your spouse, and your dependents (if any). Below is a list of documents you will need to bring to The Benefit Bank **OR** information about you or your parents that you will need to know in order to fill out your FAFSA worksheet or paper form:

- ID such as Social Security Number, driver's license (if any), alien registration number (if a non-citizen).
- Marital status, such as date of divorce or 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** dates of removal from your record for such convictions.
- Level of education, including degrees or certifications received.
- Records of earned income, such as W-2 forms.
- Tax returns for you and your parents (if they have been filed):
  - IRS Form 1040, 1040A, or 1040EZ. *NOTE: You can use The Benefit Bank to file your Form 1040. If you file your return with The Benefit Bank, we will use your tax information to fill out your FAFSA, so you will have fewer questions to answer.*
  - 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 (CDs), 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 and 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).*