



FINANCIAL AID CHECKLIST

FAFSA & CSS PROFILE

In order to be considered for financial aid you will need to submit a Free Application For Student Aid (FAFSA). Some of your colleges might also require the College Scholarship Service (CSS) Profile.

www.fafsa.ed.gov

www.cssprofile.org

PLAN AHEAD

The year beginning in January of your sophomore year will be the tax year from which your first year financial aid package will be determined, this is called "prior prior year". Make any financial adjustments before this year to ensure you will be given maximum consideration for financial aid. Colleges publish a "net price calculator" on their website. Use it to predict your financial aid and merit awards.

APPLYING FOR FINANCIAL AID

Students planning to enroll in college the following fall should complete the FAFSA and CSS profile (if applicable) as soon as it opens on October 1, the year prior to enrollment. Some colleges have "priority consideration" deadlines as early as Nov 15 and in many cases, the early bird gets the worm. Your financial profile (income, debt, assets, college savings, etc.) from 2 years prior to enrollment will be evaluated to determine aid.

DID YOU KNOW?

You will need to apply for financial aid every year to be considered for need-based aid.

F A F S A

DOCUMENT CHECKLIST

- FSA ID to sign electronically
- Your Social Security Number
- Your Alien Registration Number (if not a U.S. citizen)
- Your federal income tax returns, W-2s, and other records of money earned. (Pro tip: use the IRS Data Retrieval Tool)
- Bank statements and records of investments (if applicable)
- Records of untaxed income (if applicable)
- If you are a dependent, then you will also need most of the above information for your parent(s) or guardian(s)

C S S P R O F I L E

DOCUMENT CHECKLIST

- Access to your CollegeBoard account
- Your most recent tax returns
- W-2 Forms and other records of current year income
- Records of untaxed income and benefits
- Assets, investments, and bank statements