



STUDENT FINANCIAL AID CHECKLIST

FOLLOW THE STEPS BELOW TO DEVELOP YOUR PERSONALIZED FINANCIAL PLAN.
CHECK OFF THE BOXES AS YOU COMPLETE EACH OF THE ITEMS.

1

GETTING PREPARED

Determine your eligibility for federal aid and review the programs.

Review eligibility requirements for Federal Financial Aid at
<https://studentaid.gov/understand-aid/eligibility/requirements>

Gather financial documents needed to complete the Free Application for Federal Student Aid (FAFSA®)

FAFSA is a registered trademark of the U.S. Department of Education.

Determine your dependency status. Use the “Dependency Status” questions below of this checklist to see whether you are an independent or dependent student.

2

APPLY FOR FINANCIAL AID

Apply for your Federal Student Aid (FSA) ID.

Visit <https://fsaid.ed.gov/npas/index.htm> and follow the on-screen instructions to apply or request a FSA ID.

If you are a dependent student, both you and a parent will need a FSA ID to electronically sign your FAFSA.

Complete the FAFSA online at <https://studentaid.gov/h/apply-for-aid/fafsa>.

Undergraduate and graduate students should include Union Institute & University school code: 010923.

After completing your FAFSA, print the FAFSA Confirmation Page for your records. If you have already completed a FAFSA for another school, click on “Make a Correction to a Processed FAFSA” and add Union Institute & University’s school code.

3

MEET WITH YOUR FINANCIAL AID COUNSELOR TO DISCUSS YOUR PERSONALIZED FINANCIAL PLAN

Discuss your personalized financial plan and review your next steps.

Appt. date & time: _____ Name: _____ Telephone: _____

Complete 2020-2021 FAFSA prior to appointment if using federal financial aid.



COMPLETING YOUR APPLICATION

WHAT DOCUMENTATION IS NEEDED TO COMPLETE THE FAFSA?

IDENTIFICATION

- Social Security Card and Driver's License (or State ID) for you and your parent(s).
- If you are not a U.S. citizen, documentation of your eligible non-citizen status.

2018 INCOME AND TAX INFORMATION

You and your parent(s) (or spouse) may be able to access 2018 IRS tax return information to complete your 2020-2021 FAFSA using the IRS Data Retrieval Tool. If you are eligible, we highly recommend using the tool for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA has accurate tax information.
3. You shouldn't need to provide a copy of your or your parents' or spouse's tax returns.

If you are unable to use the IRS Data Retrieval Tool, you will need 2018 tax information to complete your 2020-2021 FAFSA. You may also need records of your parents'/parent's income (if you are a dependent student). Please use the following guide to gather your documents:

- Your (and your spouse's, if married) 2018 federal income tax return.
- Parents'/parent's 2018 federal income tax return (if you are a dependent student).
- W-2 forms or other records of income earned.
- Current bank statements and records of stocks, bonds, and other investments.
- Business or farm records, if applicable.
- Records of other untaxed income received, such as federal means benefits, Social Security, or military or clergy allowances.

HOW DO I DETERMINE MY DEPENDENCY STATUS?

The federal government has established how dependency status is determined for federal financial aid purposes. If a student is considered a dependent, his or her parents'/parent's income and asset information must be included on the FAFSA. This information will be used in addition to the student's income and asset information to determine the Expected Family Contribution (EFC). If you answer "No" to ALL of the questions, you are a dependent student. If you answer "yes" to any of the following questions it means you are an independent student for 2020-2021:



YES NO

Were you born before January 1, 1997?

As of today, are you married?

At the beginning of the 2020-2021 school year, will you be working on a master's or doctorate program?

Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?

Are you a veteran of the U.S. Armed Forces?

Do you now or will have children who will receive more than half of their support from you between July 1, 2020, and June 30, 2021?

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2021?

At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent/ward of the court?

As of today, are you an emancipated minor or legal guardianship as determined by a court in your state of legal residence?

At any time on or after July 1, 2019, were you an unaccompanied youth who was homeless, or at risk of being homeless?

For comprehensive consumer information, visit <https://myunion.edu/home/consumer-information>