FAFSA®
Checklist

The FAFSA® (Free Application for Federal Student Aid) is the first step in the financial aid process. It is used to apply for federal student aid, such as grants, loans and work-study. In Pennsylvania, information from the FAFSA is also used to determine student eligibility for the Pennsylvania State Grant.

Before filing the FAFSA®, gather the following:

INCOME & TAX INFORMATION

- ☐ Taxable income from your 2015 W-2 forms or other records of money earned or received
- ☐ 2015 Untaxed income, including workers' compensation; child support; housing, food and other living allowances; or veterans benefits, etc.
- ☐ 2015 Federal Income Tax Return (IRS tax form 1040, 1040A, or 1040EZ - if you were required to file)

> **Note:** If you complete your FAFSA online, you have the option of automatically retrieving your income and tax data from the Internal Revenue Service and having it transferred into your FAFSA. The IRS Data Retrieval Tool is the preferred method to complete the FAFSA.

- ☐ 2015 Foreign tax return or a tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, or the Federated States of Micronesia or Palau.

If you are a dependent student, you will also need:

- ☐ The income and tax records (as listed above) of your parent(s)

CURRENT ASSET INFORMATION

- ☐ Bank statements
- ☐ Business and investment information; business and farm records; stocks, bonds, and other investment records (as applicable)

If you are a dependent student, you will also need:

- ☐ The asset information (as listed above) of your parent(s)

PERSONAL DOCUMENTS

- ☐ Social Security Number
- ☐ Driver's license number and state of issuance (optional)
- ☐ Alien registration number or permanent residence card (if you are not a U.S. citizen)

If you are a dependent student, you will also need:

- ☐ The Social Security Number(s) of your parent(s)

FSA ID

- ☐ FSA ID

> **Note:** A FSA ID is a username and password used to log into U.S. Department of Education websites and electronically sign the FAFSA. You and a parent will each need your own separate FSA ID.
>
> Go to fsaid.ed.gov to receive your FSA ID.

Now you're ready...
Visit FAFSA.gov to file for FREE!

PHEaa℠
Pennsylvania Higher Education Assistance Agency