

Financial aid checklist

for students and parents

Use this checklist as a personal record and as a reminder of the steps to take to obtain financial aid. Check off each step as you complete it.

For you and your parents

If you are in doubt as to whether or not to apply for aid, apply!

Do not wait for college acceptance letters before filing for aid. File in January or February — the earlier the better. You do not need to have completed your tax returns prior to filling out the Free Application for Federal Student Aid (FAFSA) or the CSS/Financial Aid PROFILE® (PROFILE). An estimate of income and/or income tax information is adequate. You cannot file the FAFSA until after October 1.

- Complete FAFSA on the Web.** Get worksheets to fill out prior to filing the FAFSA at www.fafsa.ed.gov. Filing online is much faster than by mail, and the website has prompts that help you avoid making mistakes. You and your parents will both need a PIN, or electronic password, before completing the form — available at www.pin.ed.gov. It's a good idea to get your PIN in advance of the deadline, although PINs can still be obtained during the FAFSA sign-up process.
- If you are applying to colleges that require PROFILE, file that form as early as possible** — as soon as you can estimate your and your parents' income tax information, keeping in mind your college's deadline. If you are applying under an early decision plan, complete your PROFILE in August or September.
- Complete income tax forms as soon as possible** in order to provide accurate data on financial aid forms. Some colleges have early February deadlines.
- Make a list of the financial aid priority dates and deadlines** at the colleges to which you are applying. Ask each college if it requires supplemental forms, and obtain them as needed.
- Apply for federal and state funds** by answering the appropriate questions on the FAFSA.
- Check for scholarships** for which you might be eligible:
 - Each college/postsecondary institution (your best source)
 - Those posted in the counseling office
 - Local and state scholarships

Details to remember

- In all written communications to financial aid offices**, put your name, address and date of birth on every page.
- Keep your financial aid worksheets.** Always make photocopies of your financial aid forms for your records.
- If you have questions about an item, do not guess.** See your counselor or speak with the college financial aid officer directly.
- Do not leave blank spaces on the forms.** Use zeros instead.
- Proofread!** And again, make photocopies of everything!

After you've filed the forms

- If you properly complete the FAFSA, you will receive a Student Aid Report (SAR)** that will provide your eligibility index for federal and state aid.
- If there are errors or incorrect information on the SAR**, you can make corrections online.
- Financial aid offers are sent by colleges either with, or shortly after you receive, a letter of acceptance.** You will be asked to sign an acceptance of the amount received, and the money will be sent to the college/postsecondary institution.
- Ask your counselor for assistance** if you have general questions. Specific questions, including those about uncommon situations, should be directed to the college financial aid officers.

For more college planning tools and guidance, visit [BigFuture.org](https://bigfuture.org).

Sources: Glenbrook High School, Illinois, and Amherst Regional High School, Massachusetts.

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