

MARIST OFFICE OF STUDENT FINANCIAL SERVICES

Financial Aid Application for Academic Year 2017 - 2018

Your file has been selected for a process called verification. As a part of this process, please complete, sign, and return this form to the Office of Student Financial Services.

We will be unable to process your financial aid until the verification process has been completed. Failure to submit all student requirements in a timely manner may impact your financial aid eligibility.

Upon review of the documentation you submit, additional information may be required.

Your need-based aid is estimated until this process is complete. You will be notified electronically if FAFSA corrections result in changes/cancellation of award(s).

NEW

IMPORTANT NOTICE: Due to new federal regulations, the 2017-2018 FAFSA application is based on **2015** income (rather than 2016). The taxed and untaxed income reported on this form should pertain to the **2015** year.

Instructions for New Students or First Time Financial Aid Applicants:

- Review and accept the **Student Financial Services Philosophy, Policy and Important Acknowledgements/Terms and Conditions** via your myMarist account. This requirement must be completed annually.
- Complete the Title IV Federal Authorization questions and any remaining Financial Aid Requirements via your myMarist account.
- If you are borrowing from the Federal Direct Loan program, you must complete a Master Promissory Note. In addition, you are federally required to complete an Entrance Counseling. These items may be completed online at www.studentloans.gov.

Section A: To Be Completed By All Students

Note: To be considered for financial assistance (of any type) for the 2017-2018 academic year, you must have applied, been accepted for admission, and be enrolled and matriculated in a degree or Title IV eligible certificate program.

1. Name: _____
Last First M CWID (Campus Wide ID Number)

2. Address: _____
Street

City State Zip Code Home Telephone Number

2a. Have you had a recent address change? YES NO
If you recently changed your address, please ensure that your most current address is on file with the Registrar's Office.

3. _____
Cell Phone Number E-mail Address

4. Date of High School graduation or GED _____ Expected date of graduation from Marist College _____

5. Will you receive any scholarships, grants or tuition reimbursement from sources other than Marist College or the Federal Government? YES NO If "Yes," list source and amount: _____

Note: If you receive tuition reimbursement or assistance, you may not be eligible for a Marist Grant. If you receive financial aid from an outside source after you have submitted this application, you must promptly notify the Office of Student Financial Services.

Section B: Student's and/or Spouse's Tax and Income Information

If you filed a 2015 Federal Income Tax Return, check the box below that applies:

- The student has used the FAFSA IRS Data Retrieval Tool prior to April 2017 to retrieve and transfer their 2015 IRS income information.
- The student has not used the FAFSA IRS Data Retrieval tool, and the student and spouse, if married, will submit a **signed** copy of the **2015 Federal Income Tax Return** that was submitted to the IRS or a **2015 IRS Tax Return Transcript**. (You can obtain a Federal Tax Return Transcript at <http://www.irs.gov/Individuals/Get-Transcript>.) The first two pages of the federal tax return and, if applicable, any corresponding Schedule C, E and SE forms are required.

Effective April 24, 2017: Because the FAFSA IRS Data Retrieval Tool is no longer available, the Department of Education is now allowing schools to accept **signed** copies of the federal income tax return in lieu of the IRS Data Retrieval or federal tax return transcript.

- The student and/or spouse has filed an amended **2015** Federal Tax Return (Form 1040X) and will submit a **signed** **2015** Federal Income Tax Return along with a **signed** copy of the **2015** 1040X amended return.

Student's And/Or Spouse's Non Tax Filing Statement

If you did not file and are not required to file a 2015 Federal Income Tax return, please check the appropriate box or boxes and complete the section below:

- Student Spouse
- The student (and/or the student's spouse, if married) was not employed and had no income earned from work in **2015**.
- The student (and/or the student's spouse, if married) was employed in **2015** and has listed below the names of all employers and the amount earned from each employer in **2015**. **Attach copies of all 2015 W-2 forms** issued to the student (and/or the student's spouse, if married). **List every employer even if the employer did not issue a W-2.**

Employer or Source of Income	2015 Amount
	\$
	\$

Untaxed Income:

List other income and benefits that you (and/or your spouse, if applicable) received during **2015** that are **not subject to income taxes**. Please attach documentation, if available, to verify these figures. Do not include financial aid.

DO NOT LEAVE THIS SECTION BLANK. IF A SOURCE OF INCOME DOES NOT APPLY, PLEASE INDICATE "0."

Sources of Untaxed Income	2015 Amount
A. Child Support Received for any of your children. Don't include foster care, adoption payments, or any amount that was court-ordered but not actually paid.	\$ _____ /mo.x _____ mos.= \$ _____ .00 Name of Adult Who Received the Support _____ Name of Child(ren) for Whom Support Was Received _____
C. Any other sources of untaxed income or money received, or paid on your behalf Please Specify: _____	\$ _____ /mo.x _____ mos.= \$ _____ .00

NOTE: If you are considered a dependent student according to the FAFSA, you must provide your parent(s) information and signature on the last page. Independent undergraduate students or graduate students should skip to "Section D." A spouse's signature is required if the spouse completed the Non-Tax Filing Section.

Section C: Parents' Tax and Income Information for Dependent Students Only

If your parents filed a 2015 Federal Income Tax Return, check the box below that applies:

- The parent/step-parent has used the FAFSA IRS Data Retrieval Tool prior to April 2017 to retrieve and transfer their 2015 IRS income information.
- The parent/step-parent has not used the FAFSA IRS Data Retrieval tool, and will submit a **signed** copy of the **2015 Federal Income Tax Return** that was submitted to the IRS or a **2015 IRS Tax Return Transcript**. (Parents can obtain a Federal Tax Return Transcript at <http://www.irs.gov/Individuals/Get-Transcript>.) The first two pages of the federal tax return and, if applicable, any corresponding Schedule C, E and SE forms are required.

Effective April 24, 2017: Because the FAFSA IRS Data Retrieval Tool is no longer available, the Department of Education is now allowing schools to accept **signed** copies of the federal income tax return in lieu of the IRS Data Retrieval or federal tax return transcript

- The parent has filed an amended **2015** Federal Tax Return (Form 1040X) and will submit a **signed 2015** Federal Income Tax Return along with a **signed** copy of the **2015** 1040X amended return.

Parents' Non Tax Filing Statement

If your parents did not file and are not required to file a 2015 Federal Income Tax Return, please check the appropriate box or boxes and complete the section below:

- The parent was not employed and had no income earned from work in **2015**.
- The parent was employed in **2015** and has listed below the names of all employers and the amount earned from each employer in **2015**. **Attach copies of all 2015 W-2 forms** issued to your parents. **List every employer even if the employer did not issue an IRS W-2 form.**

Employer or Source of Income	2015 Amount
	\$
	\$

Untaxed Income:

List other income and benefits that your parents received during **2015** that are **not subject to income taxes**. Please attach documentation, if available, to verify these figures. Do not include student financial aid.

DO NOT LEAVE THIS SECTION BLANK. IF A SOURCE OF INCOME DOES NOT APPLY, PLEASE INDICATE "0."

Sources of Untaxed Income	2015 Amount
A. Child Support Received for any of your children. Don't include foster care, adoption payments, or any amount that was court-ordered but not actually paid.	\$ _____ /mo.x _____ mos.= \$ _____ .00 Name of Adult Who Received The Support _____ Name of Child(ren) for Whom Support Was Received _____ _____
B. Any other sources of untaxed income or money received, or paid on your behalf Please Specify: _____	\$ _____ /mo.x _____ mos.= \$ _____ .00

Section D: Family Information

Dependent students: List the people in your parents' household, including:

- Yourself and your parent(s) (including stepparent) even if you don't live with your parents.
- Your parents' other children if your parents will provide more than half of their support from **July 1, 2017 through June 30, 2018**, or if the children would be required to provide parental information when completing a FAFSA for 2017-2018. Include children who meet either of these standards, even if they do not live with your parents.
- Other people if they now live with your parents and your parents provide more than half of their support and will continue to provide more than half of their support through **June 30, 2018**.

Independent students: List the people in your household, including:

- Yourself, and your spouse, if married.
- Your children if you will provide more than half of their support from **July 1, 2017 through June 30, 2018**, even if the children do not live with you.
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through **June 30, 2018**.

Write the names of all household members in the spaces below. Also write in the name of the college for any household member, excluding college names for your parent and any household member attending U.S. Military Service Academies. Only include college names for students who will be attending college at least half-time between **July 1, 2017 and June 30, 2018**, and will be enrolled in a degree, diploma, or certificate program. If you need more space, attach a separate page.

Full Name	Date of Birth	Relationship	College*	Enrolled At Least Half Time?
		Student/Self	Marist College	Yes

***NOTE:** Marist College may verify college enrollment of household members via the National Student Clearinghouse after October 15, 2017. If college enrollment cannot be confirmed, the student's FAFSA will be updated, which may result in a retroactive change or cancellation of need-based financial aid.

Child Support Paid Verification:

Did you, your spouse or your parent/step-parent pay child support in 2015? Yes No If Yes, please answer the following:

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name and Age of Child for Whom Support Was Paid	Amount of Child Support Paid in 2015

Signature of Person who Paid Child Support: _____ Date: _____

Section E: Signature(s)

I certify that the information provided on this application is complete and true to the best of my knowledge and I will notify the Office of Student Financial Services of any changes to the information provided on my financial aid application and/or any additional assistance that I receive for educational expenses. **WARNING:** Per federal regulation, if you purposely give false or misleading information on this worksheet you may be fined and/or sentenced to jail.

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. §1232g; 34 CFR Part 99) is a federal law that protects the privacy of student education records. The law applies to all schools that receive funds under an applicable program of the U.S. Department of Education. For more information visit: www.ed.gov/policy/gen/guid/fpco/ferpa/index.html

For dependent students: Please note your signature authorizes your student financial information to be released to and discussed with the parent/stepparent listed in section D of the application. If you wish to restrict access to your student financial information while attending Marist College, please e-mail the Office of Student Financial Services at studentfinancialservices@marist.edu.

Student's Signature Date Parent's Signature Date

Please Return all documentation to:

Office of Student Financial Services · Marist College · 3399 North Road · Poughkeepsie, NY 12601-1387

Please fax form to: (845) 575-3099 · Please email form to: studentfinancialservices@marist.edu For more information go to: www.marist.edu/sfs

PLEASE ALLOW AT LEAST TWO WEEKS FOR PROCESSING