

## FAFSA Checklist

A new FAFSA is available starting **October 1**. When applying for the 21/22 FAFSA use the two years back tax information, which would be **2019**.

Students (and parents if the student is considered dependent) will need the following information:

You will need access to the following information to file a FAFSA:

### Student Information:

\_\_ Your FSA ID (get one at [fsaid.ed.gov](https://fsaid.ed.gov))

\_\_ Your Social Security number

\_\_ Your driver's license number (if you have one)

\_\_ Your alien registration or permanent resident card (if you are not a U.S. Citizen)

\_\_ Your two years prior W-2 forms, 1099, Schedule C, and other records of money earned

\_\_ Your (and you're spouse's, if you are married) two year prior Federal Income Tax Return (Federal 1040 or a Foreign Tax Return).

**The preferred method is uploading your tax information using the Data Retrieval Tool embedded in the FAFSA.**

\_\_ Your current bank account balances as of the date you're filing the FAFSA

\_\_ Your prior year untaxed income records

\_\_ Your current business and investment mortgage information, business and farm records, stock, bond and other investment records.

If you can answer "**YES**" to any of the following you do NOT have to include Parent Information:

- ✓ I turned 24 before January 1 of this year
- ✓ I am married
- ✓ I am serving in active duty or am a veteran of the U.S. Armed Forces
- ✓ I have children
- ✓ I am an emancipated minor or I have a legal guardian who is not my parent
- ✓ I have been declared a homeless or unaccompanied youth
- ✓ After I turned 13 years old I was orphaned, in foster care, or a ward of the court

If you cannot answer "**YES**" to one of the above statements, you are considered a dependent student and will need to include parent/step-parent information on the FAFSA.

### Parent Information:

\_\_ Your parent's FSA ID (get one at [fsaid.ed.gov](https://fsaid.ed.gov))

\_\_ Your parents' prior year Federal Income Tax Return (Federal 1040 or a Foreign Tax Return).

**The preferred method is uploading your tax information using the Data Retrieval Tool embedded in the FAFSA.**

\_\_ Your parents' two years prior W2s, 1099, Schedule C, and other records of money earned

\_\_ Your parents' prior year untaxed income records

\_\_ Your parents' current bank account balances as of the FAFSA filing date

\_\_ Your parents' current business and investment mortgage info records, stock, bond and other investment records.