

# FAFSA Workshop Checklist

A new FAFSA is available October 1. Apply for financial aid using the tax information filed in April. 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 prior year W-2 forms, 1099, Schedule C, and other records of money earned
- \*Your (and you're spouse's, if you are married) prior year Federal Income Tax Return (Federal 1040, 1040A or 1040EZ) OR a Foreign Tax Return, Tax Return from Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federal States of Micronesia, or Palau. **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, 1040A or 1040EZ) OR a Foreign Tax Return, Tax Return from Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federal States of Micronesia, or Palau. **The preferred method is uploading your tax information using the Data Retrieval Tool embedded in the FAFSA.**
- \*Your parents' prior year 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 information, business and farm records, stock, bond and other investment records