Alfred University
Financial Aid Application 2016-17

Student Financial Aid Office
Alfred University
One Saxon Drive
Alfred, NY 14802

PHONE: 607·871·2159
FAX: 607·871·2252
www.alfred.edu

1. **Name** _____
   Last First M.I.

2. **Permanent/Home Address**

   _____
   Street

   _____
   City State Zip

   (_____)_____
   Home Phone

   Soc. Sec. No. _____

   Email _____

   Cell Phone No. _____
   (Student's)

3. **Housing Plans for 2016-17**
   ❑ With Parents ❑ Residence Hall ❑ Off Campus ❑ With Relative (please specify) _____

   If off campus or with relative, provide address: _____

4. **Citizenship Status** Are you a U.S. Citizen? ❑ Yes ❑ No

5. **During the 2016-2017 academic year, you will be a**
   ❑ New Freshman ❑ Returning Undergraduate ❑ New Graduate ❑ Special Student (non-degree/non-matriculating)
   ❑ New Transfer ❑ Returning Graduate ❑ AU Readmit

6. **Indicate your intended enrollment status for each semester.**

Fall 2016	Spring 2017	Summer 2017
❑ Full-time	❑ Full-time	❑ Full-time
❑ Part-time	❑ Part-time	❑ Part-time
Number of credits? _____	Number of credits? _____	Number of credits? _____
❑ Co-op	❑ Co-op	❑ Co-op
❑ Study abroad	❑ Study abroad	❑ Not attending
❑ Not attending	❑ Not attending	

7. **Anticipated Graduation Date from Alfred University** _____
   Month/Year

8. **Other Financial Aid Resources** For the 2016-2017 academic year, will you receive any outside financial assistance such as a private or civic scholarship/grant, non-NY state scholarship/grant, state agency benefits, or tuition benefits from your or your parents' employer? ❑ Yes ❑ No If "yes," identify the type below. Do not include AU Scholarships.

   Name of award or benefit source — Amount for 2016-2017

   _____ $ _____

   _____ $ _____

9. **Please list other colleges to which you have applied (Freshman & transfer students only)**

   1. _____ 4. _____
   2. _____ 5. _____
   3. _____ 6. _____

10. Will you receive Veterans Educational Benefits between 7/1/16 and 6/30/17? ❑ Yes ❑ No

If "yes," specify the type (Chapter and eligibility percent) _____

For questions 11 through 19, if you are required to report parents' information on the Free Application for Federal Student Aid (FAFSA), you must also provide parents' information where requested in this section. Do not leave any item blank. Enter "0" whenever applicable.

11. Do your parents own all or part of a business or farm? ❑ Yes ❑ No If "yes," complete a, b, c, d, and e.
If parents own more than one business, provide this for each business on an attached sheet.

a. Type of Business/Farm: ❑ Sole Proprietorship ❑ Partnership ❑ C Corporation ❑ S Corporation

b. Number of full-time employees: _____ **c.** Parent(s) percent of ownership: _____

d. If parents do not own 100% of the business, provide the name, percent of ownership and family relationship to parents for the other owner(s)

(Example: Jack Jones, 50%, Brother) _____

e. Farm Owners: Do you live on and operate the farm? ❑ Yes ❑ No

12. Parent Information

a. Are your legal parents (biological/adoptive) currently married and living together in the same household? ❑ Yes ❑ No
If "yes", proceed to number 13. If "no", complete 12b, 12c, and 12d for your legal parents.

b. Parent #1 _____
Name Street City State Zip Code

Parent #2 _____
Name Street City State Zip Code

c. Check the box which describes your legal parents' marital status to each other.
❑ ❑ Separated ❑ ❑ Divorced ❑ ❑ Not married and <u>not</u> living together ❑ Not married and living together

d. If you checked separated, divorced, or not married and <u>not</u> living together in 12c, complete the following:

1. Name the legal parent in 12b that you lived with most (more than one-half of the time) during the past 12 months. _____ **This person is the custodial parent** for financial aid purposes.

Is your custodial parent remarried? ❑ Yes ❑ No

2. Provide the following for the parent not named in 12d1. **This person is the noncustodial parent** for financial aid purposes.

_____ _____ _____
Name Occupation Annual Income

3. File the **Alfred University Noncustodial Parent Form**. This required form is available at www.alfred.edu or the AU Financial Aid Office.

13. Does your custodial parent or stepparent, <u>with whom you live</u>, pay child support to <u>another</u> household? ❑ Yes ❑ No
If "yes," complete a, b, and c. Do not include names or amounts for children included in question **14.**

a. Name of parent paying child support. _____

b. Annual amount of child support paid in 2015 for all children who do not live in student's household. $ _____

c. Name of children for whom payments were made. _____

14. Household Member Listing

a. Provide the following information for all family members and other people who now live in your household, and will continue to live there and receive over one-half of their support from the head(s) of the household for the period July 1, 2016 to June 30, 2017. Include yourself and your parents. Complete college attendance only if the person will be enrolled in a program that leads to a college degree or certificate. **Indicate both enrollment and student status** (FT = Full-Time, PT = Part-Time, GR = Graduate Student, UG = Undergraduate Student). Part-time means at least 6 credit hours for one semester during the year.

				2016-2017 College Attendance	
Name	Age	Date of Birth	Relationship	Name of College	Enrollment and Student Status
			Self		❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR
					❑ FT ❑ PT ❑ UG ❑ GR

b. Name any family member in **14a** who will live at home while attending college. _____

c. Specify the type(s) and amount(s) of financial assistance to be received for each household member in 14a who will be enrolled as a graduate student. For example: Assistanships, tuition waivers, stipends, grants.

_____

15. Home Owners If you are a dependent student, provide the following for your parents. If you are an independent student, provide the following for yourself and your spouse.

a. Year purchased _____

b. Purchase price $ _____

c. Present market value $_____

d. Primary mortgage home equity loan balance

$ _____

e. Monthly home mortgage payment $ _____

f. Is part of the home rented to a nonrelative and included as rental income and expenses on the federal tax return?
❑ Yes ❑ No

g. If 15f is yes, provide the percentage of home expenses attributed to the rental expenses on the tax return.

$ _____

16. Are you or your parents the beneficiary of a trust or estate? ❑ Yes ❑ No If "yes," complete the following, **but do not** include this amount in **19** of this form.

_____ $_____ $_____

Name of Beneficiary | Value of Trust/Estate | Annual Income

17. Breakdown of Federal Tax Return Income

• If 2015 tax returns are not completed, provide estimates.

		PARENTS		STUDENT AND SPOUSE	
		2015	Estimated **2016**	**2015**	Estimated **2016**
a. Wages, salaries, tips (Total of W-2 Forms-Box 5 and IRS Form 1040 Lines 12 and 18).	Father/Student (Stepfather)				
	Mother/Spouse (Stepmother)				
b. Interest income (IRS Form 1040-Line 8a, 1040A-Line 8a, or 1040EZ-Line 2).					
c. Dividend income (IRS Form 1040-Line 9a or 1040A-Line 9a).					
d. Business and farm income or (loss) (IRS Form 1040-Lines 12 and 18).					
e1. Income or (loss) from rents, partnerships, trusts, S corporations, etc. (IRS Form 1040-Line 17).					
2. Box 14 (Code A) of IRS Schedule K-1 (Form 1065).					

f. Other taxable income such as alimony received, capital gains or (losses), pensions, unemployment compensation, social security, etc. (IRS Form 1040-Lines 10, 11, 13, 14, 15b, 16b, 19, 20b, and 21 or 1040A-Lines 10, 11b, 12b, 13, and 14b or 1040EZ-Line 3). **List the 1040/1040A line numbers, sources and amounts below.**

1040 Line Number & Source	**Amount**			

g. IRA and self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040-total of Lines 28 and 32 or 1040A-Line 17.				
h. Tax-exempt interest income from IRS Form 1040-Line 8b or 1040A-Line 8b.				
i. **Untaxed** portions of IRAs and pensions from IRS Form 1040-Lines 15a minus 15b and 16a minus 16b or 1040A-Lines 11a minus 11b and 12a minus 12b. Exclude "rollovers."				
j. Untaxed portions of health savings account from IRS Form 1040-Line 25.				
k. Foreign income exclusion from IRS Form 2555-Line 45 or 2555 EZ-Line 18.				
l. Education credits from IRS Form 1040-Line 50 or 1040A-Line 33.				

18. Non-Taxable Income Breakdown

	PARENTS		STUDENT AND SPOUSE	
	2015	Estimated **2016**	**2015**	Estimated **2016**
a. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S (**Do not include code DD, Employer Health Insurance Contribution**).				
b. Untaxed Social Security benefits. Report amount received for the student in the student column. Report the amount received for the parents and all other dependent children in the parents column. Include Supplemental Security Income. Do not include any amount reported as taxable on the IRS Form 1040-Line 20b or 1040A-Line 14b.				
c. Welfare benefits, including Temporary Assistance for Needy Families (TANF). Report cash payments only. Do not report housing subsidies or food stamps.				
d. Annual child support amount received for all children.				
e. Veteran's noneducation benefits. Include Disability, Death Pension, Dependency & Indemnity Compensation (DIC), and VA Educational Work Study.				

f. All other non-taxable income not reported elsewhere on this form. **Include** untaxed pensions, unemployment, retirement, and IRA distributions not reported in **17i** of this form; workers' compensation; disability; housing, food and living allowances paid to members of the military, clergy, and others (include cash payments and cash value of benefits). **Do not include** the value of on-base military housing or basic military allowance for housing. **List the sources and amounts below.**

Source	Amount			

19. Breakdown of Parents'/Student's Assets

	PARENTS	STUDENT AND SPOUSE
a. Cash, savings, and checking accounts.	$	$
b. Non-real estate investments. Include UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Do not include the value of life insurance, retirement plans (non-education IRAs, pension funds, annuities, Keogh plans, 401(K) plans, etc.), prepaid tuition plans, or amounts reported in **19a.**	$	$
c. Provide the value of qualified educational benefits or education savings accounts (Coverdell savings accounts, 529 college savings plan and refund value of 529 prepaid tuition plans). Otherwise, enter "0".	$	$

20. Other Real Estate Owned Dependent students provide the following for your parents. Independent students provide the following for yourself and your spouse. Include rental property, land, vacation homes, and second homes. Report amounts for your percentage of ownership. **Do not include the family's primary residence.** Enter "0" if no other real estate is owned.

Market Value	Debt	Purchase Price	Year Purchased	Address
$ _____	$ _____	$ _____	_____	_____
$ _____	$ _____	$ _____	_____	_____
$ _____	$ _____	$ _____	_____	_____

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21. Do you expect that your or your parents' total 2016 income will be significantly less than 2015 income? ❑ Yes ❑ No

If "yes," attach to this form an explanation of why family income will be less for 2016 and be sure to complete the 2016 estimated income column for numbers **17 and 18** on this application.

22. Have you filed the Free Application for Federal Student Aid? ❑ Yes ❑ No Date filed _____
(You may file at **www.fafsa.gov**)

SIGNATURES, CERTIFICATION, AND AUTHORIZATION

Signatures are required of **all** persons for whom information is submitted on the Alfred University Financial Aid Application and Free Application for Federal Student Aid. Parent signatures are required for dependent students. If the student is married, the student's spouse must also sign.

- I (We) certify that all of the information on this form and any other form submitted in application for financial aid administered by Alfred University is true and complete to the best of my (our) knowledge, and agree to provide proof, if requested by an appropriate Alfred University employee. I (We) also realize that if I (we) do not provide proof when asked, the student may be denied aid.
- I (We) agree to immediately report any changes in the information reported on the Alfred University Financial Aid Application and Free Application for Federal Student Aid to the Alfred University Student Financial Aid Office. This includes, but is not limited to, changes in parents', student's, and spouse's income, household size, number of college students; and student's address, enrollment status, and housing status.
- I (We) agree to immediately report any non-Alfred University scholarships, grants, or tuition assistance received by the student to the Alfred University Student Financial Aid Office.
- If selected for an Alfred University scholarship, I understand Alfred University may announce my name and scholarship award for public relation purposes (example: home town media) or to the donor of endowed and funded awards.

_____ _____
Student's Signature Date **Spouse's** Signature Date

_____ _____
Father's (Stepfather's) Signature Date **Mother's** (Stepmother's) Signature Date

(_____)_____ (_____)_____
Father's (Stepfather's) daytime or cell phone number Mother's (Stepmother's) daytime or cell phone number

Preferred email for Parent Contact _____