**School year 2018-2019  
 Student Financial Aid Checklist**

**Instructions:**

* Review and check off each item. Fill in/complete information where request.
* It is preferred that you complete this form on your computer and then print and bring to your meeting.
* It is imperative that this form is completed in its entirety (where applicable) prior to your Financial Aid meeting.

**Parents Name:** Click here to enter text.

**Student(s) Name:** Click here to enter text.

**High School:** Click here to enter text.

**Students Email:** Click here to enter text.

**Students Cell Phone:** Click here to enter text.

**Students FSA ID Username:** Click here to enter text.

**Students FSA ID PASSWORD**: Click here to enter text.

**Students email address associated with FSA ID**: Click here to enter text.

**College Board username, email & password:** Click here to enter text.

**Students’ Income Checklist**

1. **Records of Income Earned in 2017 & 2018 (taxed or untaxed)**

W-2’s K-1s

1099s Other (Please list:Click here to enter text. )

1098s

1. **Copy of 2016 & 2017 Completed Federal Income Returns**

Personal

Business

1. **Current Residency Mortgage/Home Equity Statements, if applicable.**

1st Mortgage Current Statement

2nd Mortgage Current Statement

Home Equity Line of Credit (HELOC) Current Statement

**Students’ Asset Checklist**

1. **Current Bank and Investment Statements on all applicable qualified asset accounts**

IRAs  403b  401k

Roth  Pension

Traditional  Profit Sharing

1. **Current Bank and Investment Statements on all applicable unqualified asset accounts**

Savings  Money Market   
 Checking  Employee Stock Ownership Program

CDs  Real Estate

Stocks  529’s

UTMA  UGMA

Coverdale  Education Trusts

**Anticipated Scholarships & Grants**

Please list all expected scholarships and Grants that you anticipate receiving

|  |  |  |
| --- | --- | --- |
| Organization | Amount | Is it renewable? |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |
| Click here to enter text. | Click here to enter text. | Click here to enter text. |

**Students’ College Choice**

Please list in order of preference/priority all colleges/universities you have already applied too.

|  |  |  |
| --- | --- | --- |
|  | College Name | FAFSA Code/CSS Code |
| **1** | Click here to enter text. |  |
| **2** | Click here to enter text. |  |
| **3** | Click here to enter text. |  |
| **4** | Click here to enter text. |  |
| **5** | Click here to enter text. |  |
| **6** | Click here to enter text. |  |
| **7** | Click here to enter text. |  |
| **8** | Click here to enter text. |  |
| **9** | Click here to enter text. |  |
| **10** | Click here to enter text. |  |

Other (If Applicable): Click here to enter text.

**Students’ Social Media Information**

|  |  |
| --- | --- |
| **Facebook:** | Click here to enter text. |
| **LinkedIn:** | Click here to enter text. |
| **Twitter:** | Click here to enter text. |
| **Instagram:** | Click here to enter text. |
| **Snapchat:** | Click here to enter text. |

Other (If Applicable): Click here to enter text.