

2007-2008 SUNY ULSTER FINANCIAL AID APPLICATION

Financial Aid Office * VAN 105, Stone Ridge, NY 12484 * (845) 687-5058

Your application was selected for review in a process called "verification". In this process, your school will be comparing information from your application with signed copies of you/your spouse's and/or your parent(s)' 2006 Federal tax forms, W-2's or other financial documents. If there are differences between your application information and your financial documents, you may need to send in corrections on your Student Aid Report (SAR), or your school may send corrections electronically, to have your information reprocessed.

Complete this verification form and submit it to your financial aid office as soon as possible, so that your financial aid won't be delayed. Your financial aid office will help you.

What you should do:

1. Collect your financial documents (signed Federal income tax forms, W-2 forms, etc.)
2. Talk to our financial aid office if you have questions about completing this worksheet.
3. Fill in and sign the worksheet--include parent(s) or spouse's if needed.
4. Take the completed worksheet, tax forms, and any other documents your school needs to your financial aid office.
5. Your financial aid office will compare information on the documents. You may need to make corrections on your SAR and send it back to the application processor.

Student Information

Last name First Name M.I.

Social Security Number

Address (include Apt. No.)

Date of birth

City State Zip code

Phone Number (include area code)

Family Information

Dependent students (born after Jan. 1, 1984):

List the people in your parents' household, include:

- ~~~yourself and your parent (s) you live with (including stepparent), and
- ~~~your parents' other children, even if they don't live with your parent (s), if (a) your parents provide more than half of their support from July 1, 2007 through June 30, 2008, or (b) the children would be required to provide parental information when applying for Federal Student Aid, and
- ~~~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 from July 1, 2007 through June 30, 2008.

Independent students (born before Jan. 1, 1984)

List the people in your household, include:

- ~~~yourself, and your spouse if you have one, and
- ~~~your children if you will provide more than half of their support and will continue to provide more than half their support from July 1, 2007 through June 30, 2008.

Full Name	Age	Relationship	College
<i>Martha Jones (example)</i>	24	<i>Wife</i>	<i>City University</i>
		Self	

**PLEASE FILL OUT FORM COMPLETELY. Place ZEROS or N/A in SPACES that DO NOT APPLY.
Place only the totals received for 2006 in the applicable spaces below.
Documentation is required to be submitted to the financial aid office for all amounts reported.**

Column 1 Student / Spouse		Column 2 Parents
\$	Earned income credit from IRS Form 1040--line 66a; 1040A--line 40a; or 1040EZ--line 8a.	\$
\$	Additional child tax credit from IRS Form 1040--line 68 or 1040A--line 41.	\$
\$	Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps or subsidized housing.	\$
\$	Social Security benefits received, for all household members that were not taxed (such as SSI). Report benefits paid to parents in the Parents column, and benefits paid directly to student (or spouse) in the Student/Spouse column.	\$
\$	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, S and box 14.	\$
\$	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified Plans from IRS Form 1040--line 28 + line 32 or 1040A--line 17.	\$
\$	Child support received for all children. Don't include foster care or adoption payments.	\$
\$	Tax exempt interest income from IRS Form 1040--line 8b or 1040A--line 8b.	\$
\$	Foreign income exclusion from IRS Form 2555--line 45 or 2555EZ--line 8b.	\$
\$	Untaxed portions of IRA distributions from IRS Form 1040--lines (15a minus 15b) or 1040A--lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Untaxed portions of pensions from IRS Form 1040--lines (16a minus 16b) or 1040A--lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$
\$	Credit for federal tax on special fuels from IRS Form 4136--line 20 (nonfarmers only).	\$
\$	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
\$	Veterans' noneducation benefits such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC), and/or VA educational Work-Study allowances.	\$
\$	Other untaxed income such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI. Don't include student aid, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, or benefits from flexible spending arrangements (e.g., cafeteria plans).	\$
\$	Money received, or paid on your behalf (e.g., bills).	\$
\$	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040--line 50 or 1040A--line 31.	\$
\$	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parents') household.	\$
\$	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
\$	Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$

Student's Tax Forms and Income Information (all applicants)

Check one box only. Tax returns include the 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a signed copy of an Internal Revenue Service form 1722 that lists tax information by calling 1-800-829-1040.

- Check and attach signed tax return
- Check and complete: signed tax return will be submitted to the school by _____(date)
- Check here if you will not file and are not required to file a 2006 U.S. Income Tax Return

Spouse's Tax Forms and Income Information (if applicable)

Check one box only. Tax returns include the 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a signed copy of an Internal Revenue Service form 1722 that lists tax information by calling 1-800-829-1040.

- Check and attach signed tax return
- Check and complete: signed tax return will be submitted to the school by _____(date)
- Check here if you will not file and are not required to file a 2006 U.S. Income Tax Return

Parent's Tax Forms and Income Information (must be completed for dependent students)

Check one box only. Tax returns include the 2006 IRS Form 1040, 1040A, 1040EZ, TeleFile Tax Record, a tax return from Puerto Rico or a foreign income tax return. If you did not keep a copy of the tax return, request a copy from your tax preparer or a signed copy of an Internal Revenue Service form 1722 that lists tax information by calling 1-800-829-1040.

- Check and attach signed tax return
- Check and complete: signed tax return will be submitted to the school by _____(date)
- Check here if you will not file and are not required to file a 2006 U.S. Income Tax Return

I live with my parent(s) while attending SUNY Ulster _____ yes _____ no

Sign this Worksheet

By signing this worksheet, I (we) certify that all the information reported on it is complete and correct. (If married, spouse's signature is optional. For dependent students, at least one parent must sign).

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student Date

Spouse Date

Father/Stepfather Date

Mother/Stepmother Date

UNDER THE PROGRAM OF THE STATE UNIVERSITY OF NEW YORK

Suny Ulster County Community College does not discriminate in education, employment or any of its businesses on the basis of sex, sexual orientation, race, color, age, veteran status, religion, national origin, or handicapping conditions. This policy is in compliance with the Title IX of the Education Amendment of 1972.

Applying for Financial Aid

1. **APPLY EARLY FOR FINANCIAL AID USING THE FOLLOWING FORMS:**

(Priority consideration date is May 1, 2007 (for Fall 2007) for campus-based aid and EOP.)

SUNY Ulster 2007-2008 Financial Aid Application

2007-2008 Free Application for Federal Student Aid - SUNY Ulster Federal code 002880

2007-2008 New York State TAP / Part-Time TAP application - complete the FAFSA and visit

www.hesc.com for more information - SUNY Ulster State code 2230

2007-2008 NYS Aid for Part-time Study if student is less than 12 credits - visit www.hesc.com for more information

Master Promissory Note for Stafford/Unsubsidized Stafford Loans

2. **Attend a Financial Aid workshop** to find out about:

Sources of Financial Assistance

How to complete the application

College procedures for processing awards

Special condition procedures

Financial aid deadline dates

3. Complete the admissions process and REGISTER EARLY for 2007-2008 classes. STUDENTS MUST BE FULLY ACCEPTED, MATRICULATED AND IN GOOD ACADEMIC STANDING TO RECEIVE FINANCIAL AID.

4. Attach copies of all 2006 income documentation to this application. (Income documentation may include Federal & State income tax returns and W-2s, SSA 1099, 2006 annual statement from the Department of Social Services, Worker's Compensation, etc.)

5. Read the financial aid newsletter COMMON CENTS. This newsletter highlights information about financial aid sources, workshop dates, important telephone numbers, check disbursement dates, and satisfactory academic progress information.

6. Hand in all awards to the Financial Aid Office, Vanderlyn 105.

Federal Pell Student Aid Report (optional)

NYS TAP award certificate

Outside scholarship notices (Elks, Kiwanis, high school, etc.)

Other educational award information (VESID, OET, Veterans)

7. Review the SUNY Ulster College Catalog for a complete description of the rights and responsibilities of students receiving financial aid. Another important source of student financial aid information is the 2007-2008 Department of Education STUDENT GUIDE.

8. Register for classes that apply toward your declared program of study. **Students are eligible to receive financial aid only for those courses taken that are applicable toward the declared program of study.** Students should prepare their class schedules to be able to complete their program of study within six semesters, as both Federal and State financial aid programs are limited to six (full time equivalent) semesters. **Courses taken for an audit grade DO NOT COUNT toward the degree or financial aid.**

9. Students who are applying for a Federal Family Education Loan (Stafford or Unsubsidized Stafford) must complete Pre-loan and Exit Interview sessions. Students must complete a pre-loan session prior to receiving the loan proceeds, and exit interview prior to leaving SUNY Ulster, even if the student is transferring to another college. **Both can be completed on www.mapping-your-future.org**

10. **The Financial Aid Office is open Monday-Friday from 8:30 a.m.-4:30 p.m.** During the Fall and Spring semesters, the office is open Tuesday evenings until 6:30 p.m.

11. Visit these online sources:

www.fafsa.ed.gov

www.hesc.com

www.mapping-your-future.org

Don't forget to check out Student Banner online at www.sunyulster.edu!!!

WHO MUST BE VERIFIED?

1. Students who are selected on the Federal Pell Student Aid Report.
2. Applicants for the Federal Family Education Loan Program.
3. Educational Opportunity Program (EOP) and APTS students.
4. Campus-based aid applicants/recipients.
5. Students who have incomplete, inaccurate, or conflicting information.

**BE SURE TO KEEP
COPIES OF ALL
YOUR APPLICATIONS**

The above criteria comprise approximately 85% of SUNY Ulster financial aid applicants.