



## UNDERGRADUATE INSTITUTIONAL APPLICATION FOR FINANCIAL ASSISTANCE 2009-2010

### PART 1: STUDENT GENERAL INFORMATION

Name: \_\_\_\_\_ Emerson ID Number: \_\_\_\_\_

 Gender:  Male /  Female Date of Birth: \_\_\_\_\_

 Are you a U. S. citizen?  Yes  No (If no and you are a permanent resident, you must attach a copy of your Permanent Resident Card)

 Permanent Address: \_\_\_\_\_ Local Address (if known): \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Permanent Phone Number: \_\_\_\_\_ Local Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

Driver's License State: \_\_\_\_\_ Driver's License Number: \_\_\_\_\_ (If you do not have a driver's license, please write "NONE")

 Housing Status:  On-Campus  Off-Campus/Apartment  Living with Parents/Relative

 Changes in housing status may affect your financial assistance. You must notify the Office of Student Financial Services if your situation changes.

How many credits will you take?

SEMESTER	NUMBER OF CREDITS	BOSTON CAMPUS	KASTEEL WELL	LOS ANGELES
Fall 2009		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Spring 2010		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Expected graduation date (month/year): \_\_\_\_\_

If you are planning to apply for financial assistance for Summer 2009, please contact the Office of Student Financial Services for a separate application.

### PART 2: STUDENT RESOURCES

**INCOME** 1. Did you or will you (the student) file 2008 federal taxes?  Yes  No

If you answered "No" to the above question, you will need to submit a Student Non-File Statement (available online).

**ASSETS** 2a. Cash and Savings: \$ \_\_\_\_\_ 2b. Stocks, Bonds, CDs, Investments: \$ \_\_\_\_\_ 2c. Uniform Gift to Minors: \$ \_\_\_\_\_

2d. Value of student's other assets: \$ \_\_\_\_\_ (e.g., real estate, 401K/403B, single premium life insurance)

 3. Are you the beneficiary of a College Savings (529) or College Prepaid (529) Plan?  Yes  No

3a. Owner of plan's name and relationship to you (the student): \_\_\_\_\_ Value: \$ \_\_\_\_\_

 3b. Are you the beneficiary of any trusts?  Yes  No

If yes, complete the following information. Then, enclose a copy of trust documents and documentation of the current value of the trust:

Trust Established By: \_\_\_\_\_ Year: \_\_\_\_\_ Total Value: \$ \_\_\_\_\_

4. List other scholarships and educational assistance that you will receive in 2009/2010 that is NOT awarded by Emerson College:

Name of Scholarship or Educational Assistance	Amount
	\$
	\$

**PART 3: CUSTODIAL PARENTS GENERAL INFORMATION**

All undergraduate students are considered **DEPENDENT** for purposes of financial assistance. Parents' information is required.

Father /  Stepfather /  Other: \_\_\_\_\_  Mother /  Stepmother /  Other: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Occupation: \_\_\_\_\_ Occupation: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_ Email: \_\_\_\_\_

How much does the custodial parent/s expect to contribute to the student's educational expenses for the upcoming academic year? \_\_\_\_\_

**PART 4: CUSTODIAL PARENTS RESOURCES**

**INCOME** 1. Did you or will you (custodial parent(s)) file 2008 federal taxes?  Yes  No  
 If you answered "No" to the above question, you will need to submit a Parent(s) Non-Filer Statement (available online).

**OTHER RESOURCES** 2. Please report income from the following sources:

Source of Income or Benefit	Amount
Contributions to tax-deferred annuity (401(k), 403(b), IRA)	\$
Untaxed distributions from pension, 401(K), 403(b), IRA	\$
Welfare Benefits (not including food stamps or fuel assistance)	\$
Housing, food, or other living allowances paid to members of the clergy, military, and others (including cash payments and cash value of benefits)	\$
Cash gifts received for living expenses	\$
Veterans' Benefits	\$
Worker's Compensation / Disability	\$
Other sources (exclude federal loans)	\$

**SOCIAL SECURITY BENEFITS**

3. If any member of your household received Social Security, list the total amount of benefits received for all household members in 2008:

Name of family member: \_\_\_\_\_ Amount of Social Security received \$ \_\_\_\_\_

Name of family member: \_\_\_\_\_ Amount of Social Security received \$ \_\_\_\_\_

Name of family member: \_\_\_\_\_ Amount of Social Security received \$ \_\_\_\_\_

**CHILD SUPPORT**

4. List the total amount of child support payments that you (custodial parent(s)) **received** in 2008: \$ \_\_\_\_\_

5. List the total amount of child support payments that you (custodial parent(s)) **paid** to other households in 2008: \_\_\_\_\_ \$

**ASSETS** 6. Cash and Savings: \$ \_\_\_\_\_ 6a. Stocks, Bonds, CDs, Investments: \$ \_\_\_\_\_

**REAL ESTATE**

	Year Purchased	Purchase Price	What is it worth today?	What is owed on it?
Home		\$	\$	\$
Other Real Estate		\$	\$	\$
Other Real Estate		\$	\$	\$

**PART 5: BUSINESS INFORMATION**

Complete this section if you (the custodial parent(s)) are self-employed or own all or part of a business. Very important - read each question carefully and answer all questions. If a question does not apply to you please write N/A. Do not leave any questions blank.

1. Are you self-employed or does the family hold an interest in any business?

(e.g., Sole Proprietorship, Partnership, C-Corporation, S-Corporation)?  Yes  No

If you are not self-employed, or do not own a business you can skip to section 6.

2. If you answered "Yes" to the question above please indicate:

2a. How many businesses do you have all or part ownership of? \_\_\_\_\_

2b. Please list the names of the businesses, type of business, percent ownership of each business, number of employees that you have, and the amount of any loans from shareholders in your name, below. Attach a separate sheet if necessary.

**BUSINESS #1**

Name of business: \_\_\_\_\_

Type of business: \_\_\_\_\_

(e.g., Sole Proprietorship, Partnership, C-Corporation, S-Corporation)

Percentage of ownership: \_\_\_\_\_

(If both spouses have stake in ownership please report combined % ownership)

Number of employees: \_\_\_\_\_

Loans from partner or shareholder in your name: \$ \_\_\_\_\_

(List amount of any personal funds that parent(s) and/or student has lent to the business)

**BUSINESS #2**

Name of business: \_\_\_\_\_

Type of business: \_\_\_\_\_

(e.g., Sole Proprietorship, Partnership, C-Corporation, S-Corporation)

Percentage of ownership: \_\_\_\_\_

(If both spouses have stake in ownership please report combined % ownership)

Number of employees: \_\_\_\_\_

Loans from partner or shareholder in your name: \$ \_\_\_\_\_

(List amount of any personal funds that parent(s) and/or student has lent to the business)

**IMPORTANT** - If you have ownership of any additional businesses please attach a separate sheet listing the names of the businesses, types of businesses, percent ownership of each business, amount of any loans from shareholders in your name, and number of employees that you have.

Also, you are required to submit the following applicable documents for each business listed:

- 2008 Schedule C of your personal federal tax return (if sole proprietorship)
- 2008 Partnership Federal Tax Return, including all schedules (if partnership)
- 2008 Corporate Federal Tax Return, including all schedules (if corporation)
- 2008 K-1 Forms for any family member who is a shareholder or partner

If you fail to submit the appropriate business tax returns your application will be considered late and you will not receive priority consideration for financial assistance.



**PART 6: NON-CUSTODIAL PARENTS GENERAL INFORMATION**

Complete this section only if your natural parents were never married or have divorced/separated.

Father /  Stepfather /  Other: \_\_\_\_\_  Mother /  Stepmother /  Other: \_\_\_\_\_

Name: \_\_\_\_\_ Name: \_\_\_\_\_

Occupation: \_\_\_\_\_ Occupation: \_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_ Email: \_\_\_\_\_

**PART 7: HOUSEHOLD INFORMATION**

The first line of the grid is for you (the student) and is partially filled out. Fill out all the appropriate boxes for yourself on the first line. Then, provide information about your family members. Include your custodial parents with whom you live or last lived, your custodial parents' other dependent children, and anyone else for whom your custodial parents will provide more than half of their support between July 1, 2009 through June 30, 2010. If you are a federally independent student list your spouse (if you are married), your children (if you will provide more than half of their support between July 1, 2009 through June 30, 2010),

NOTE: Student's parents living in the household must be listed in the grid below. However, according to federal regulations, expenses for parents in college cannot be included for the purpose of calculating financial assistance eligibility.

Full Name	Age	Relationship Code*	Name of College in 2009-2010	Graduation Date	Full-Time	Half-Time	Less Than Half-Time	Graduate Program?
<i>You (the student)</i>		<i>self</i>	<i>Emerson College</i>					<i>N/A</i>

**PART 8: SPECIAL CIRCUMSTANCES, EXPLANATIONS, COMMENTS**

Please attach an additional sheet if you want us to be aware of special circumstances that are not reflected in the financial assistance application.

**PART 9: PARENT AND STUDENT STATEMENT**

We have reviewed our responses to all the questions on this form and do solemnly affirm their accuracy and completeness to the best of our knowledge. We have also read and understand the rights and obligations as described in the Undergraduate Financial Assistance Process description which accompanied this application. We promise to notify the Office of Student Financial Services in writing if the student withdraws from Emerson College or reduces courses below full-time status during the academic year. We understand that unsatisfactory academic progress or failure to fulfill these obligations may result in a discontinuance of any financial assistance awarded. We promise to notify the Office of Student Financial Services in writing if the student plans to attend part of the academic year at the Los Angeles or the Kasteel Well campus. We understand that financial assistance can only be used for courses that are required for the student's Emerson degree program. If I choose to take courses not required for my degree program, I understand that I cannot receive any assistance for those courses.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please attach the IDOC cover sheet and return this form to:

THE COLLEGE BOARD IDOC  
 PO BOX 4017  
 MT VERNON, IL 62864



## 2009 - 2010 UNDERGRADUATE FINANCIAL ASSISTANCE PROCESS

In an effort to promote the integrity of federal, institutional, and state financial assistance programs and ensure equitable distribution of available funds, it is the policy of Emerson College's Office of Student Financial Services to verify the information provided by all applicants for financial assistance, including all applications for educational loans.

We encourage you to use figures from a completed 2008 Federal Income Tax Return when completing the Free Application for Federal Student Aid (FAFSA). If your tax return is not completed in time to submit the FAFSA by the deadline, you are urged to estimate, to the best of your ability, the figures requested on the form. In this case, your completed 2007 Federal Tax Return may assist you in your 2008 estimations.

**IMPORTANT NOTE:** In order for you, the applicant, to receive full consideration for scholarships, grants, loans and/or Federal Work Study, the FAFSA (or FAFSA Renewal Application) must be received by Emerson and supporting documentation must be received and processed by the College Board's IDOC Service, both no later than April 15, 2009 for returning students. DO NOT send supporting documentation directly to Emerson College. For fastest FAFSA processing, complete the form online at <http://www.fafsa.ed.gov>. It is the applicant's responsibility to ensure that his/her completed financial aid application materials are received and processed by IDOC by the deadline. **Our office will not send any missing information requests.** Financial assistance notification letters will be mailed for on-time upperclassmen (sophomores, juniors, and seniors) by July 1, 2009.

### ADDITIONAL INFORMATION/REQUIREMENTS

**State Scholarships** - All applicants are REQUIRED to apply on-time for their respective state scholarships if their legal state of residence is CT, DE, MD, MA, ME, NH, PA, RI, and VT. Applicants applying for a state scholarship or grant from one of the states listed above are asked to contact their home state scholarship program for specific application procedures and deadlines.

**Federal Student Loan Program** - Federal Student Loan eligibility is determined by demonstrated financial need. All student loan applicants for Subsidized or Unsubsidized Stafford Loans must have a complete financial assistance application on file as described in this form, prior to the determination of loan eligibility.

**Satisfactory Academic Progress** - Federal regulations require a student to be making satisfactory academic progress in order to receive financial assistance. Satisfactory academic progress policies are outlined in the *Emerson College Student Handbook* and the *Undergraduate Catalogue*.

**Status Changes** - Changes in enrollment or housing status may affect your financial assistance. You must notify the Office of Student Financial Services if your situation changes. Financial assistance for juniors and seniors is dependent on the number of credits needed to graduate. Once degree requirements are met, financial assistance may be changed accordingly.

### REQUIRED DOCUMENTATION CHECKLIST

An applicant's financial assistance file will not be considered complete until all requested information has been received with all pages and signatures and processed by IDOC. Make sure to attach the IDOC cover sheet to your application packet.

A completed application for financial assistance consists of the following:

1. \_\_\_\_\_ 2009-2010 Free Application for Federal Student Aid (FAFSA) or the Renewal Application FULLY COMPLETED and sent to the Federal Processor. NOTE: Be sure to list Emerson College (code 002146) in the Releases and Signatures section. Please remember that processing takes 2-3 weeks for online FAFSA.

The following documents must be submitted directly to IDOC with the IDOC cover sheet (available at <https://idoc.collegeboard.com>):

2. \_\_\_\_\_ Emerson College Undergraduate Institutional Application for Financial Assistance\*
3. \_\_\_\_\_ SIGNED copy of parents' 2008 Federal Income Tax Return, including all schedules, W-2 forms, and 1099 forms. If no tax return was or will be filed for 2008, a completed Emerson College Parent Non-Filer Statement\* must be submitted along with W-2 and 1099 forms, if applicable.
4. \_\_\_\_\_ SIGNED copy of student's 2008 Federal Income Tax Return, including all schedules. If no tax return was or will be filed for 2008, a completed Emerson College Student Non-Filer Statement\* must be submitted.
5. \_\_\_\_\_ If you provided Non-Custodial Parent information to Emerson in prior applications, you do not need to resubmit the information unless requested by the Office of Student Financial Services. If the Office of Student Financial Services has not received Non-Custodial Parent information in the past, you will be required to complete the Non-Custodial Parent's Statement\* for 2009-2010 PRIOR to the application deadline.
6. \_\_\_\_\_ Any other documentation as requested by the Office of Student Financial Services.

\*Indicates the form can be obtained at the Office of Student Financial Services or online at <http://www.emerson.edu/finaid>.

**Late Applicants** - Applicants whose financial assistance files become complete in our office after the specified priority date will be considered late applicants. We will review and award late applicants as funding permits.

For further information regarding financial assistance policies and procedures, you are strongly encouraged to visit our website: [www.emerson.edu/finaid](http://www.emerson.edu/finaid). Our website contains important details on types of assistance available, eligibility requirements, and deadlines.

THIS PAGE IS FOR YOUR RECORDS