



LEHIGH UNIVERSITY



TRANSFER APPLICATION FOR FINANCIAL AID 2007-2008

Lehigh University
Office of Financial Aid
218 West Packer Avenue
Bethlehem, PA 18015-1588
(610)758-3181 Fax (610)758-6211
e-mail: infao@lehigh.edu
<http://www.lehigh.edu/~infao>

APPLICANT INFORMATION

Name _____ Lehigh Identification# _____

Home Address: Street _____ City _____ State _____ Zip _____

Home Phone() _____ County _____

Primary/Cell Phone () _____ E-Mail Address _____

Estimated # of credits to transfer _____ Will you commute from home? " no " yes If yes, from what town? _____

Anticipated Graduation Date _____ Date of Birth _____

Would you like a work-study job for 2007-2008? " no " yes

Term for which aid is being requested: Academic year 2007-2008 Fall 2007 **only** Spring 2008 **only**

If you have previously borrowed under the Stafford Loan Program, please provide the name and lender code of your lender: _____ (Code) _____

Schools previously attended:	City, State	CSS code, (if known)	Dates attended	Financial Aid received? (yes/no)
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

VERIFICATION INFORMATION

To receive Federal student aid, you are required to complete a process called *Verification*. Completing the following section, and signing this application, will fulfill that requirement. On the grid below, list and provide information about each person your parents **will support between July 1, 2007 and June 30, 2008**. Include yourself, the parents with whom you live (including stepparent) and any other dependents currently living in your parents' household. **Please do not leave any items blank. Answer with N/A if not applicable.**

If any household member listed below is enrolled in secondary or elementary education for which your parents pay tuition, indicate that amount and any other scholarship and grant assistance below. Also write in the name of the college for any household member who will be attending college at least half-time between July 1, 2007 and June 30, 2008; they must be enrolled in a degree or certificate program. If enrollment plans change for any person listed below, *notify us immediately*. Changes in enrollment will most likely affect your aid eligibility. If you need additional space, please use the Comments Section.

Put **N/A** for items that do not apply and **unknown** if unknown. List additional members in the comments section.

Full Name	Age	Relationship to Student	Name of School or College	Year in School	Tuition	Scholarships and Grants	Housing Code*
Student Applicant		Self	Lehigh University		\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	

*Housing Codes: 1 - live at school (on or off campus) 2 - commute from home

UNTAXED INCOME AND BENEFITS FOR 2007

Please indicate below the amount of *untaxed income* from any of the following: *(may be found on your tax returns or W-2 forms)*

Source	Parent(s)	Student (and Spouse)
Deductible IRA/Keogh	\$ _____	\$ _____
Earned Income Credit	\$ _____	\$ _____
Untaxed Pension	\$ _____	\$ _____
Foreign Income Exclusion	\$ _____	\$ _____
Untaxed Social Security	\$ _____	\$ _____
Tax Exempt Interest	\$ _____	\$ _____
Payments to Tax Deferred Pensions (401k, 403b, etc.)	\$ _____	\$ _____
Welfare Benefits	\$ _____	\$ _____
Worker's Compensation	\$ _____	\$ _____
Child Support	\$ _____	\$ _____
Housing, Food, Living Allowances (military, clergy, etc.)	\$ _____	\$ _____
Additional Child Tax Credit (from IRS 1040)	\$ _____	\$ _____
Other: _____	\$ _____	\$ _____

Comments: Please explain any **special circumstances** that might affect your financial situation below. Anticipated decreases in income should be documented on the “**Change of Financial Circumstances**” form located in the “**Forms**” area of our web-site

(www.lehigh.edu/~infao).

FINANCIAL INFORMATION

Parents or Independent Student - The following information is to be completed by your parents *unless you satisfy any of the criteria defining an independent student as stipulated by the Federal Government and Lehigh University's Office of Financial Aid*. If you meet the independent criteria, please complete this section with your information (and that of your spouse, if applicable).

Indicate whose information is listed: _____ Parent(s) _____ Independent Student and Spouse

1. What is the principal balance on the first mortgage? \$ _____

2. Monthly mortgage payment on principal (**excluding amount in escrow for taxes**): \$ _____

3. Do parents (or independent student) have a home equity loan approved? " **no** " **yes**

a. If yes, amount approved \$ _____

b. Amount borrowed to date \$ _____

c. Annual payment required \$ _____

4. If your parents (or yourself, if an independent student) own real estate other than their home, list the properties owned:

Property	Year of purchase	Purchase price	Current value	Amount owed
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

(List any additional properties in the Comment Section)

5. Are your parents **required** by their employers to contribute to their retirement plans?
 " **no** " **yes** If yes, what is the required monthly amount? \$ _____

6. Do you have a trust fund? " **no** " **yes** If yes, what is the value? _____
 Who established the trust fund? _____

7. Child support and alimony received and/or paid	Received in 2006	Paid in 2006
a. Total amount of child support	\$ _____	\$ _____
b. Child support for student applicant	\$ _____	\$ _____
c. Alimony	\$ _____	\$ _____

EXPENSES

Is there other debt for education, consumer products, etc? " **no** " **yes**

Purpose for borrowing	Current amount owed
_____	\$ _____
_____	\$ _____
_____	\$ _____

Do your parents pay for elder care? " **no** " **yes**
 If yes, what was the amount paid during 2006? \$ _____

Did you have medical or dental expenses that were not covered by insurance during 2006? " **no** " **yes**
 If yes, what was the amount paid during 2006? \$ _____

STUDENT MOTOR VEHICLES: please refer to the motor vehicle policy in the Student Handbook.

Will you have a car on campus for the 2007-2008 academic year? " **no** " **yes**

If yes, what is the year, make and model of the car? _____

Who is the registered owner of car? _____

Student's Driver's License # _____ State of Issuance _____

FOR YOUR CAREFUL ATTENTION:

Financial aid recipients must:

- enroll for no fewer than **12 credit hours** per semester
- make progress toward your degree by passing no fewer than **12 credits per semester and 24 credits** per academic year
- be in *good standing*, maintain a *minimum grade point average* of **2.0 each semester** and *continue to demonstrate financial need*. Students not meeting these minimums may appeal, through the petitioning process, to the Committee on Undergraduate Financial Aid.
- **apply** to their state grant program and any private scholarships for which they might be eligible
- notify us directly, and immediately, upon receiving any private scholarship including aid from an employer
- submit, with this application, **signed** copies of the **student's and parents'** 2006 IRS 1040 including *schedules and W-2 forms*.
- put in writing, any request for reconsideration based on special circumstances, noting as much detail as possible.
- return application by **March 1** to: **Office of Financial Aid, 218 W. Packer Ave., Bethlehem, PA 18015**

Additional information on aid eligibility may be found in the Lehigh University Course Catalogue.

CHECKLIST

Please be careful to put the correct social security number and proper name on all application materials.

For your records, *make a photocopy of all forms filed* and *record the date each form was mailed*. Please complete the following checkoff list so that we know how you are progressing with your application. Submit each form no later than **March 1, 2007**.

Date sent

- _____ **CSS/PROFILE** online at www.collegeboard.com (the CSS code for Lehigh is **2365**). **This is very important!**
- _____ **Renewal FAFSA** online at the Federal processor website, www.fafsa.ed.gov. Lehigh's Title IV School Code is **003289**. **This is very important!**
- _____ **Please send this form, together with the following items, to the Office of Financial Aid:**
- _____ 1. **Complete, signed copies** of both the student and the parents' 2006 **IRS 1040** including all *schedules and W-2's*, or a completed non-filer's statement which is also available online at www.lehigh.edu/~infao. Copies of extensions filed with the IRS are acceptable in the interim: but it is the **family's responsibility** to forward **signed copies** of the completed tax return as soon as it is prepared. (Tax Return Extensions will cause delays in disbursing funds to a student's account and delay loan processing)
- _____ 2. **Non-custodial Parent's Statement (NPS)** or the **Business/Farm Supplement (BFSUP)**, (if applicable) available online at www.lehigh.edu/~infao. NOTE: The NPS may now be completed on-line at www.collegeboard.com

Applications will not be reviewed until they are complete and the student has been offered admission as a transfer student.
(Contact us if you need any forms sent to you or visit our website at www.lehigh.edu/~infao).

It is possible that funds may be depleted before late or incomplete files are reviewed.

SIGNATURES

I understand that if I should be named a scholar through one of the Lehigh University Endowed or Sponsored funds my directory information (name, college, class, etc.) may be disclosed to the donor of said scholarship. By signing this application, I certify that all of the information reported to qualify for federal and state aid is complete and accurate. I acknowledge my responsibility to notify the Office of Financial Aid if any academic, financial or certification information changes during the period of enrollment.

STUDENT'S SIGNATURE _____ **Date** _____

By my signature below, I certify that the information provided by the applicant and myself is true and correct to the best of my knowledge and that I have read the above information regarding renewal of financial aid.

PARENTS'/SPOUSE'S SIGNATURE _____ **Date** _____