

Lehigh University Upperclass Financial Aid Application 2008-2009

(Please do not leave any items blank. Answer N/A if not applicable.)

Student's Name _____ Campus Box _____

Lehigh Identification Number _____ Campus Phone (____) ____ - _____

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

Home Address: _____ Home Telephone (____) ____ - _____

Street _____ County _____

City _____ State _____ Zip Code _____

Term for which aid is being requested:

- Academic year 2008-2009 Fall 2008 **only** Spring 2009 **only** Engineering **Co-Op** Participant (Summer 2009 & Spring 2009)

Anticipated Date of Graduation _____

Will you commute from home? **no** **yes**

Do you plan to be a gryphon? **no** **yes**

Do you plan to study abroad? **no** **yes** If yes, which semester(s)? _____

Do you plan to attend summer school? **no** **yes** If yes, where? _____

Do you plan to be a President's Scholar? **no** **yes** If yes, starting with which term? _____

Will you receive any *private* scholarships for 2008-2009? (*Do not include Lehigh University grants or scholarships.*) **no** **yes**

If yes, who is the donor? _____ What is the amount? _____

Would you like a work-study job for 2008-2009? **no** **yes**

VERIFICATION INFORMATION

To receive Federal student aid, you are required to complete a process called *Verification*. Schools are required to obtain this information under the financial aid program rules (34CFR, Part 668). Completing the following sections, 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, 2008 and June 30, 2009**. **Include yourself, the parents(s) with whom you live (including stepparent) and any other dependents currently living in your parents' household.**

If any household member listed below is enrolled in a 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, 2008 and June 30, 2009; 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 or *unk* if unknown. List additional members in the Comments Section.

Full Name	Age	Relationship to Student	Name of School or College 2008-2009	Year in School 2008-09	Tuition	Scholarships and Grants	Housing Code*
		Self	Lehigh University		\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	

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

(Please do not leave any items blank. Answer N/A if not applicable.)

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
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: _____	\$ _____	\$ _____

Included in the financial aid award many students receive, is support from endowed and sponsored scholarship funds established by alumni and friends of Lehigh. Please list your activities and honors to help in choosing scholarship recipients. Occasionally this information will be used to introduce you to the fund contact.

Activities _____

Honors _____

Comments: Please explain any **special circumstances** that might affect your financial situation on a separate paper and include with your application. 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

(Please do not leave any item blank. Answer with N/A if not applicable.)

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/or Spouse

If you/or your parents own a home:

1. What is the principal balance on the *first* mortgage? \$ _____
2. Monthly mortgage payment on principal (**exclude amount escrowed 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 \$ _____

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)

Are your parents **required** by their employers to contribute to their retirement plans?

no **yes** If yes, what is the required annual amount? _____

What is the total monthly amount your parents contribute to their retirement plans? _____

Do you have a trust fund? **no** **yes** If yes, what is the value? _____

Who established the trust fund? _____

Child support and alimony received and/or paid

	Received in 2007	Paid in 2007
a. Total amount of child support	\$ _____	\$ _____
b. Child support for student applicant	\$ _____	\$ _____
c. Alimony	\$ _____	\$ _____

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

Will you have a car on campus for the 2008-2009 academic year? **no** **yes**

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

Who is the registered owner of car? _____

Relationship to student _____

FOR YOUR CAREFUL ATTENTION:

The following rules apply to financial aid recipients:

- Aid is limited to eight consecutive semesters from the date of enrollment, except for approved 5 year programs of study (such as Arts/Engineering) or by special permission of the Committee on Undergraduate Financial Aid (after a student completes the petition process)
- Continue to demonstrate financial need as determined by the Office of Financial Aid in conjunction with federal, state and university guidelines.
- Make progress toward your degree by enrolling and passing no fewer than **12 new credits per semester and 24 credits** per academic year and be in *good standing*, maintain a *minimum grade point average* of **2.0 each semester**.
- **Students not meeting these minimums may appeal to the Committee on Undergraduate Financial Aid. The “Petition For Review of Financial Aid Eligibility”, can be found online at www.lehigh.edu/~infao.**
- Apply to your state grant program and any private scholarships for which you might be eligible
- Notify us directly and immediately, upon receiving any private scholarships including from any employer.
- In requesting consideration of special circumstances, make those requests in writing with as much detail as possible. The form, “**Change of Financial Circumstances**” can be found online at www.lehigh.edu/~infao
- Return application by *April 15th* 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)

Notification of financial aid eligibility will be mailed prior to the Bursar's billing date **if your application is complete**. Late filers are at risk of not being aided.

CHECKLIST

Please be careful to put the correct Lehigh Identification Number (LIN) 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 **April 15, 2008**.

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!**
- _____ *LU Application* (this form), together with the following items, to the Office of Financial Aid:
- _____ 1. ***Complete, signed copies*** of both the student and the parents' 2007 **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 (NCPS)*** 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
- _____ ***Scholarship Survey*** available after we receive your completed CSS PROFILE. The survey may be accessed through the Scholarship area of our website www.lehigh.edu/~infao.

Applications will not be reviewed until they are complete. You may access information on the status of your application through the campus portal. It is possible that funds may be depleted before late or incomplete files are reviewed.

SIGNATURES

By my signature, I acknowledge my responsibility to notify the Office of Financial Aid if any academic, financial or certification information changes during the period of enrollment. I also acknowledge that I have read and understand the above information concerning renewal of financial aid. In addition 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. I also agree to comply with any additional requests for information from the Office of Financial Aid.

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.

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

References to Online Instructions for Applying for Financial Aid 2008-2009 Academic Year

APPLICATION DEADLINE: APRIL 15, 2008

All Forms and Applications may be found on the Financial Aid website under
“Applying for Financial Aid” or “Forms”
www.lehigh.edu/~infao .

CSS/Financial Aid PROFILE

Complete filing by **April 15th** must be completed on-line at www.collegeboard.com
Lehigh CSS code number – **2365** – **Be sure to receive confirmation of completion**

Free Application For Federal Student Aid (regular or renewal)

To be completed on-line at www.fafsa.ed.gov . Be sure to **submit** request.
Lehigh code number - **003289**.

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Be sure to complete and sign. This document is used to complete verification requirements.

2008-2009 Lehigh University Scholarship Survey

The survey is used to help us identify potential recipients of certain restricted scholarships. Complete the survey in the Scholarship area on the Financial Aid website. This survey may not be accessed until we receive your completed CSS PROFILE form.

2007 Federal Tax Returns & W2 Statements

Attach a complete, signed copy of the Parent and Student 2007 IRS 1040 form with all pages, schedules and W2 statements. This is also a verification requirement. Families who file an extension with the IRS should submit a copy of their extension request & W2 statements to be followed by the completed form when available. A non-filer’s form may be used if **no return** will be filed.

Business/Farm Supplement

Required from those families who own a business or have an interest in an income producing enterprise or own a farm. Families must also submit a copy of their Corporate Tax Returns and Schedule K-1.

Non-Custodial Statement

To be completed by the parent the student **does not** live with. New this year, the form may be completed on-line at www.collegeboard.com. Paper copies may be downloaded from our website. Be sure to have this parent submit a complete, signed copy of their 2007 Federal IRS 1040 with all pages, schedules and W2 statements.

Summer Applications – Submission Deadline April 1, 2008

Assistance is limited to loans and student employment. Eligibility is determined utilizing all of the required 2008-2009 academic year documents (CSS, FAFSA, tax returns).

Important Notes:

- *Applicants who submit applications after the filing deadline are at risk of not being funded.
- *Renewal of financial aid is subject to on-time applications, continued demonstrated financial need, and acceptable academic progress (passing and completing no fewer than **12 new credits per semester** with a GPA of at least a **2.0 per semester and cumulatively**). If special circumstances contributed to poor academic performance, you may petition the Financial Aid Committee. Summer school attendance may also help improve academic standing.
- *Be sure to retain a copy of all financial aid application materials and award letters.
- *Many of our forms are now available on-line through our website at www.lehigh.edu/~infao .
- *Applications are considered incomplete until **all required materials** are received.
- *The anticipated mailing date for bills from the Bursar's Office for the 2008 fall term is **July 15th** with a due date of **August 1st**.
- * Payment plan information is sent by the Bursar in June, with payments beginning July 1st. We are unable to provide aid information prior to these deadlines. You may estimate similar aid eligibility if there have been no significant changes to your situation (number in college, income increase, etc.)

REMEMBER

You may check the status of your application on the campus portal.