

Lehigh University Upperclass Financial Aid Application 2011-2012

(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: _____
 Home City, State, Zip Code: _____

Term for which aid is being requested:

Academic year 2011-2012 Fall 2011 **only** Spring 2012 **only** Engineering *Co-Op* Participant (Summer '11/Spring '12)

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 in 2011? 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 2011-2012? (Do not include Lehigh University grants or scholarships.) no yes
 If yes, Who is the donor? _____ What is the amount? _____

VERIFICATION INFORMATION

To receive Federal or university funded 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, 2011 and June 30, 2012**. **Overpayment cases will be referred to the US Department of Education.**

*****Include yourself, the parents(s) with whom you live (including stepparent) and any other dependents currently living in your parents' household.*****

Put N/A for items that do not apply or *unk* if unknown.

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

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

**Please complete these sections if your parents will pay tuition for any household member listed above (elementary, secondary or post-secondary) in the 2011-2012 award year. If enrollment plans change for any person listed below, *notify us immediately*. Changes in enrollment will most likely affect your aid eligibility.

TAX FORMS AND INCOME INFORMATION

STUDENT'S Tax Forms and Income Information:

Tax Forms: (Federal tax returns, all schedules and W2s - **Please do not send your State/Local Tax Returns**)

- I am attaching my tax returns.
- I have already submitted my tax returns to the school. These were submitted on _____.
- I am not filing a tax return, and am not required to file a 2010 U.S. Income Tax Return.

Please indicate below the amount of *untaxed* income that the student received in 2010:

Tax Exempt Interest: Form 1040 or 1040 A line 8b		Payments to Tax Deferred Pensions: W2 boxes 12a - 12d, codes D, E, F, G, H, S	
Deductible IRA/Keogh: Form 1040 line 28 + 32; 1040A line 17		Untaxed Pensions: 1040 line 16a minus 16b; 1040A line 12a minus 12b	
Child Support:		Workman's Compensation:	
Foreign Income Exclusion:		Welfare Benefits:	
Housing, Food, Living Allowances:		Other:	

If you did not file and are not required to file a 2010 Federal income tax return, please indicate below any sources of income received in 2010. Attach a copy of all W-2's from employer(s). Be sure to include any interest or dividend income that the student received in 2010.

Sources	2010 Income
Income Earned from Work:	
Interest Earned (cash, savings and checking accounts):	
Dividends Received:	

PARENT'S Tax Forms and Income Information:

Tax Forms: (Federal tax returns, all schedules and W2s - **Please do not send your State/Local Tax Returns**)

- I am attaching a copy of my parent's tax returns
- I have already submitted my parent's tax returns to the school. These were submitted on _____.
- My parent(s) are not filing a tax return, and are not required to file a 2010 U.S. Income Tax Return.

Please indicate below the amount of *untaxed* income that your parent(s) received in 2010:

Tax Exempt Interest: Form 1040 or 1040 A line 8b		Payments to Tax Deferred Pensions: W2 boxes 12a - 12d, codes D, E, F, G, H, S	
Deductible IRA/Keogh: Form 1040 line 28 + 32; 1040A line 17		Untaxed Pensions: 1040 line 16a minus 16b; 1040A line 12a minus 12b	
Child Support:		Workman's Compensation:	
Foreign Income Exclusion:		Welfare Benefits:	
Housing, Food, Living Allowances:		Other:	

If your parent(s) did not file and are not required to file a 2010 Federal income tax return, please indicate below any sources of income that they received in 2010. Attach a copy of all W-2's from employer(s). Be sure to include any interest or dividend income that your parent(s) received in 2010.

Sources	2010 Income
Income Earned from Work:	
Interest Earned (cash, savings and checking accounts):	
Dividends Received:	

ADDITIONAL 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:

What is the principal balance on the *first* mortgage? \$ _____
 What is the monthly mortgage payment on principal? \$ _____ (exclude amount escrowed for taxes)
 Is there a home equity loan approved? **no** **yes**
 If yes, amount approved \$ _____
 Amount borrowed to date \$ _____
 Annual payment required \$ _____

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

Property	Purchase Year	Purchase Price	Current Value	Amount Owed
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

Does the student have a trust fund? **no** **yes**

If yes, what is the value? _____ Who established the trust fund? _____

Child Support and/or Alimony

	Received in 2010	Paid in 2010
Total amount of child support	\$ _____	\$ _____
Child support for student applicant	\$ _____	\$ _____
Alimony	\$ _____	\$ _____

Student Motor Vehicles (Please refer to the motor vehicle policy in the Student Handbook)

Will you have a car on campus for the 2011-2012 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? _____

COMMENTS AND SPECIAL CIRCUMSTANCES

If you feel there are **special circumstances** that might affect your financial situation, please attach a letter detailing such circumstances. Anticipated decreases in income should be documented on the "Change of Financial Circumstances" form located on our website.

FERPA/PRIVACY ACT

The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99) is a Federal law that protects the privacy of student education records. FERPA prohibits our office from releasing your Financial Aid information to your parents. Please sign the waiver below if you would like to enable us to discuss your record with the individual(s) listed below. For more information visit: <http://www.ed.gov/policy/gen/guid/fpco/ferpa/index.html>

I give the Lehigh University Office of Financial Aid permission to release information about my Financial Aid applications and awards to my parent(s) listed below. This waiver of my FERPA rights will remain in effect during the 2011-2012 academic year:

Name	Relationship to Student
_____	_____
_____	_____

Student Signature: _____

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.
- * Students must continue to demonstrate financial need as determined by the Office of Financial Aid in conjunction with federal, state and university guidelines.
- * Students must make progress toward their 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/financialaid.
- * Students must be enrolled in no fewer than **12 credit hours** per semester.
- * Students are expected to apply to their state grant program and any private scholarships for which they might be eligible.
- * Students are required to notify us directly and immediately upon receiving any private scholarships, including funds from any employer.
- * Return the complete application to our office by **April 15th**. (Applications completed after the deadline are at risk of limited/no funding.)
- * 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.

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

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.** Submit each form no later than **April 15, 2011**.

- 1.) **CSS/PROFILE:** Should be completed online at www.collegeboard.com (School Code for Lehigh: 2365)
- 2.) **Renewal FAFSA:** Should be completed online at www.fafsa.ed.gov (Lehigh's Title IV School Code: 003289)
- 3.) **Lehigh University Upperclass Financial Aid Application:** Submit this form along with the following items, to the Office of Financial Aid
- 4.) **Submit complete, signed copies of both the student and parents' 2010 IRS 1040** including all schedules and W-2s.
 - a. If you or your parents are not filing and are not required to file, be sure to indicate that on page two of this application.
 - b. If you file an extension on your taxes, copies of that extension 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)
- 5.) **Non-custodial Parent's Statement (if applicable):** If your biological parents are not married, and your custodial parent is not remarried, you must submit the Non-custodial Parent's Statement, along with copies of Non-Custodial Parent's tax returns, W-2s, and any accompanying schedules. This form should be completed on-line at www.collegeboard.com.
- 6.) **Business/Farm Supplement (if applicable):** If either of your parent's are self-employed or are owners (part or full) of a corporation/partnership, the Business/Farm Supplement must be submitted along with copies of the business tax returns (Schedule C, Corporate Tax Returns and/or Partnership Tax Returns). These forms must be submitted by the same deadline as the Parent's Tax Forms. This form is available online at www.lehigh.edu/financialaid.
- 7.) **Scholarship Survey:** This will be available online after we receive your completed CSS PROFILE (NOTE: This is not required by the April 15th deadline). The survey may be accessed through the Lehigh Campus Portal. Instructions for completing this step may be found on our website at www.lehigh.edu/financialaid.

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** _____

Instructions for Applying for Financial Aid 2011-2012 Academic Year

COMPLETE APPLICATIONS DUE: APRIL 15, 2011

**All Forms and Applications may be found on the Financial Aid website:
www.lehigh.edu/financialaid**

CSS/Financial Aid PROFILE

To 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

Lehigh code number – 003289 – **Be sure to receive confirmation of completion**

Lehigh University Upperclass Financial Aid Application 2011-2012

Be sure to complete and sign this form. This document will be used to complete verification requirements.

2010 Federal Tax Returns & W2 Statements

Attach a complete, signed copy of the Parent and Student 2010 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. **Please do not send your State/Local Tax Returns.**

2011-2012 Lehigh University Scholarship Survey

The survey is used to help us identify potential recipients of certain restricted scholarships. The survey may be accessed through the Lehigh Campus Portal. Instructions for completing this step may be found on our website at www.lehigh.edu/financialaid. This survey may not be accessed until we receive your completed CSS PROFILE form.

Business/Farm Supplement

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

Non-Custodial Statement

If applicable, this is to be completed by the parent with whom the student **does not** live with. This 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 2010 Federal IRS 1040 with all pages, schedules and W2 statements.

Summer Applications – Submission Deadline April 1, 2011

Assistance is limited to loans and student employment. Eligibility is determined utilizing all of the required 2011-2012 academic year documents (CSS, FAFSA, tax returns).

Important Notes:

- * Applicants whose applications become complete 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/financialaid.
- * Applications are considered incomplete until **all required materials** are received.
- * The anticipated mailing date for bills from the Bursar's Office for the 2011 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.)
- * Missing document requests are mailed to the student via e-mail (to your Lehigh account) & via paper.

REMEMBER

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

Submit all forms to:

**Lehigh University
Office of Financial Aid
218 W. Packer Avenue
Bethlehem, PA. 18015**

Phone: 610-758-3181

Fax: 610-758-6211

E-mail: financialaid@lehigh.edu