



LEHIGH UNIVERSITY®

2014-2015 Application for Financial Aid

(Do Not Leave Any Items Blank. Answer N/A if Not Applicable.)

A. STUDENT INFORMATION

Student Name: _____ LIN*: _____

*If you have not yet been given a Lehigh Identification Number (LIN), please provide your Social Security Number

Are you applying for: ☐ Federal and Institutional Aid ☐ Federal Aid Only**

**Note: If you are applying for Federal Aid Only, you will only need to submit the FAFSA. If you have been selected for verification by the government you may be required to submit additional documentation, as requested from our office.

Term(s) for which aid is being requested (check one):

☐ Full 2014-2015 Year ☐ Fall 2014 ☐ Spring 2015 ☐ Engineering Co-op Participant (Summer 2014 & Spring 2015)

Anticipated Graduation Date (Month & Year): _____

Will you commute from home? YES ☐ NO ☐

Will you receive any *Private* Scholarships in 2014-2015? YES ☐ NO ☐ (Do NOT include any Lehigh University aid.)

| Scholarship Name | Amount |
|------------------|--------|
| | \$ |
| | \$ |

B. FAMILY INFORMATION

On the grid below, list and provide information about each person your parents **will support between July 1, 2014 and June 30, 2015. Include yourself, your parents(s) with whom you live (including step-parent) and dependents currently living in your parents' household.**

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

If additional persons are included in the household, please provide an attached list of names and information.

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

**Complete these sections if your parents will pay tuition for any household member listed above (elementary, secondary or post-secondary) in the 2014-2015 award year. If enrollment plans change for any person listed above, *notify us immediately*. Changes in enrollment will most likely affect your aid eligibility.

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C. FEDERAL VERIFICATION

If your application is selected for federal verification, you will be required to complete this form and use the IRS Data Retrieval Tool* to import your federal income tax information from the IRS on the FAFSA. If you are unable to use the IRS Data Retrieval Tool* you may provide our office with a copy of an official 2013 Tax Return Transcript (*this is not a request for a copy of an IRS 1040, 1040A, or 1040EZ which you filed with the IRS*) for both yourself and your parent(s). You will be notified by our office if you have been selected for verification by the government and have not completed one of the above steps. Failure to comply will result in the prevention of disbursement of all federal funds to your student account and could potentially put you at risk of being charged a late payment fee due to the resulting unpaid balance.

*The IRS Data Retrieval Tool cannot be used until one to two weeks after electronically filing a tax return and six to eight weeks after filing paper tax returns. You may need to use the Data Retrieval Tool after your original filing date by submitting a FAFSA correction.

D. STUDENT'S TAX FORMS AND INCOME INFORMATION**STUDENT'S Tax Forms and Income Information:** (Federal tax returns, all schedules and W2s)

- ☐ I am attaching my tax returns or have already submitted my federal income tax return and W-2(s) to the school on _____.
- ☐ I am not filing a tax return, and am not required to file a 2013 Federal Income Tax Return.

If the student filed a tax return, please indicate below the amount of **untaxed** income that the student received in 2013:

| Sources of Untaxed Income | Amount | Sources of Untaxed Income | Amount |
|--|--------|--|--------|
| Tax Exempt Interest: IRS Form 1040 or 1040 A line 8b | \$ | Payments to Tax Deferred Pensions: W-2 Form: boxes 12a to 12d, codes D, E, F, G, H, S | \$ |
| Deductible IRA/Keogh: IRS Form 1040 line 28 + 32; 1040A line 17 | \$ | Untaxed Pensions: IRS Form 1040: line 16a minus 16b; 1040A line 12a minus 12b | \$ |
| Other: | \$ | | \$ |

If the student did not file and is not required to file a 2013 Federal income tax return, please indicate below any sources of income received in 2013. Attach a copy of all W-2's received from employer(s).

| Sources | 2013 Income (if not required to file a tax return) |
|--|--|
| Income Earned from Work: | \$ |
| Interest Earned (cash, savings and checking accounts): | \$ |
| Dividends Received: | \$ |
| Other Untaxed Income: | \$ |

E. PARENT(S)' TAX FORMS AND INCOME INFORMATION**PARENT'S Tax Forms and Income Information:** (Federal tax returns, all schedules and W2s)

- ☐ I am attaching a copy of my parent's tax returns or have already submitted my parent's tax returns to the school on _____.
- ☐ My parent(s) are not filing a tax return, and are not required to file a 2013 U.S. Income Tax Return.

If your parent(s) have filed a tax return, please indicate below the amount of **untaxed** income that your parent(s) received in 2013:

| Sources of Untaxed Income | Amount | Sources of Untaxed Income | Amount |
|--|--------|--|--------|
| Tax Exempt Interest: IRS Form 1040 or 1040 A line 8b | \$ | Payments to Tax Deferred Pensions: W-2 Form: boxes 12a to 12d, codes D, E, F, G, H, S | \$ |
| Deductible IRA/Keogh: IRS Form 1040 line 28 + 32; 1040A line 17 | \$ | Untaxed Pensions: IRS Form 1040: line 16a minus 16b; 1040A line 12a minus 12b | \$ |
| Child Support: | \$ | Welfare Benefits: | \$ |
| Housing, Food, Living Allowances: | \$ | Other: | \$ |

If your parent(s) did not file and are not required to file a 2013 Federal income tax return, please indicate below any sources of income that they received in 2013. Attach a copy of all W-2's received from employer(s).

| Sources | 2013 Income (if not required to file a tax return) |
|--|--|
| Income Earned from Work: | \$ |
| Interest Earned (cash, savings and checking accounts): | \$ |
| Dividends Received: | \$ |
| Other: | \$ |

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F. ADDITIONAL 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).

1.) Indicate whose information is listed: ☐ Parent(s) ☐ Independent Student and/or Spouse

2.) If your parent(s) or yourself (Independent Student) own real estate other than their home, list the properties owned:

| Address | Year Purchased | Purchase Price | Current Value | Amount Owed |
|---------|----------------|----------------|---------------|-------------|
| | | \$ | \$ | \$ |
| | | \$ | \$ | \$ |
| | | \$ | \$ | \$ |

3.) Does the student have a trust fund? ☐ YES ☐ NO

If yes, what is the value? _____

| 4.) Child Support and/or Alimony | Received in 2013 | Paid in 2013* |
|--------------------------------------|------------------|---------------|
| Total amount of child support: | \$ | \$ |
| Child support for student applicant: | \$ | \$ |
| Alimony: | \$ | \$ |

* For **Child Support paid**, please confirm:

- Name of Individual who paid the child support: _____
- Name of individual to whom child support was paid: _____
- Name(s) of child(ren) for whom child support was paid: _____

5.) Will you have a car on campus for the 2014-2015 academic year? check one): Yes ☐ No ☐

If Yes, please indicate the year, make and model: _____

Who is the registered owner of the car (name and relationship to student): _____

G. FERPA PRIVACY ACT WAIVER

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 the person(s) listed below. This waiver of my FERPA rights will remain in effect during the 2014-2015 academic year:

Name: _____

Relationship to Student: _____

Name: _____

Relationship to Student: _____

Student Signature

Date

H. 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.

I. RULES AND REGULATIONS

The following rules apply to all 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.
- Financial need is reviewed annually to ensure aid eligibility, as determined by the Office of Financial Aid in conjunction with federal, state and university guidelines, reflects the current financial situation. In order to maintain federal and institutional grant eligibility from one academic year to the next, students must continue to demonstrate financial need. Changes in circumstances such as a sibling(s) enrollment in undergraduate college, changes in household size or changes in income may result in a change in financial aid eligibility. Complete **renewal** applications are due to our office by April 15th of each year.
- 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 in order to maintain institutional grant eligibility.
- 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. These resources may result in an adjustment to the financial aid award. Receipt of state or federal grants or scholarship will result in a one-for-one reduction of any institutional need-based grant assistance.
- Late filers are at risk of not being aided.
- Overpayment cases will be referred to the US Department of Education.
- If you have been selected for verification by the Federal government, schools are required to obtain the requested information under the financial aid program rules (34CFR, Part 668).
- Additional information on aid eligibility may be found in the Lehigh University Course Catalogue.

J. IMPORTANT NOTES

- Applications are considered incomplete until **all required materials** are received. It is the student's responsibility to ensure that the financial aid application is complete. Application status can be viewed on the student portal.
- We strongly encourage you to utilize the IRS Data Retrieval Tool when submitting your FAFSA or by submitting a FAFSA correction after your 2013 federal tax returns have been submitted.
- Current students should check their Lehigh email for important notifications from our office.
- The anticipated mailing date for bills from the Bursar's Office for the 2014 fall term is **July 15th** with a due date of **August 1st**. Notification of financial aid eligibility will be mailed prior to the Bursar's billing date **if your application is complete**.
- Payment plan information is sent by the Bursar's Office in June, with payments beginning July 1st. We may be unable to provide financial aid awards **to current students** prior to these dates (NOTE: Prospective students who submitted a complete financial aid application by the given deadline should receive a financial aid notification along with their letter of admission).

K. 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'S SIGNATURE: _____ **DATE:** _____

Please submit to Lehigh University's Office of Financial Aid
via Fax: (610) 758-6211, Dropbox via www.lehigh.edu/financialaid, or mail