



# LEHIGH UNIVERSITY®

## 2014-2015 Transfer Student Financial Aid Application

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

### A. STUDENT INFORMATION

Student Name: \_\_\_\_\_ LIN: \_\_\_\_\_

E-Mail: \_\_\_\_\_ Primary/Cell Phone: \_\_\_\_\_

Campus Box: \_\_\_\_\_ Campus Phone: \_\_\_\_\_

Home Address: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Term(s) for which aid is being requested (Check One):

- Full 2014-15 Year  
  Fall '14  
  Spring '15  
  Engineering Co-op Participant (Summer '14 & Spring '15)

Anticipated Graduation Date (Month & Year): \_\_\_\_\_

Will you commute from home? YES  NO

List below all previous colleges or universities you've attended:

School Name	City	State	Dates Attended	Financial Aid Received? (Y/N)

### B. FAMILY 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, 2014 and June 30, 2015. Include yourself, parents(s) with whom you live (including step-parent) and all other dependents currently living in your parents' household.** Overpayment cases will be referred to the US Department of Ed.

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 & Grants**	Housing Code*
Student Applicant		Self	Lehigh University		N/A	N/A	
					\$	\$	
					\$	\$	
					\$	\$	
					\$	\$	

*If additional persons are included 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

\*\* Please 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 below, *notify us immediately.* Changes in enrollment will most likely affect your aid eligibility.

**C. STUDENT'S 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 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.

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	\$
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 2012 Federal income tax return**, please indicate below any sources of income received in 2013. 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 2013.

Sources	2013 Income
Income Earned from Work:	\$
Interest Earned (cash, savings and checking accounts):	\$
Dividends Received:	\$
Other:	\$

**D. PARENT(S)' TAX FORMS AND INCOME INFORMATION****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 2013 U.S. Income 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:	\$	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 2012 Federal income tax return**, please indicate below any sources of income that they received in 2013. 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 2013.

Sources	2013 Income
Income Earned from Work:	\$
Interest Earned (cash, savings and checking accounts):	\$
Dividends Received:	\$
Other:	\$

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**E. 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 you or your parents own a home:

A. What is the principle balance on the first mortgage? \$ \_\_\_\_\_

B. What is the monthly mortgage payment on principal? \$ \_\_\_\_\_

C. Is there a home equity loan approved? (Check One):  YES  No

a. If Yes, What is the approved amount? \$ \_\_\_\_\_

b. What is the amount borrowed to date? \$ \_\_\_\_\_

c. What is the annual payment required? \$ \_\_\_\_\_

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

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

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

If Yes, What is the Value? \$ \_\_\_\_\_ Who established the fund? \_\_\_\_\_

5.) Child Support and/or Alimony

	Received in 2013	Paid in 2013
<b>Total amount of child support:</b>	\$ _____	\$ _____
<b>Child support for student applicant:</b>	\$ _____	\$ _____
<b>Alimony:</b>	\$ _____	\$ _____

6.) A. Will you have a car on campus for the 2014-2015 academic year? (Check One):  YES  No

B. If yes, please indicate the year, make, and model. \_\_\_\_\_

C. Who is the registered owner of car? \_\_\_\_\_ Relationship to student? \_\_\_\_\_

**F. 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

**G. COMMENTS AND SPECIAL CIRCUMSTANCES**

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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.

**H. RULES AND REGULATIONS**

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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.
- 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](http://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.
- 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)

**I. IMPORTANT NOTES**

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- 1.) All application materials must be submitted by the **APRIL 1<sup>st</sup> (FALL) or NOVEMBER 15<sup>TH</sup> (SPRING) DEADLINE**.
- 2.) Applications are considered incomplete until **all required materials** are received.
- 3.) Missing document requests will be sent as email notification and are also viewable on the campus portal.
- 4.) The anticipated mailing date for bills from the Bursar's Office for the 2014 fall term is **July 15<sup>th</sup>** with a due date of **August 1<sup>st</sup>**.
- 5.) Payment plan information is sent by the Bursar in June, with payments beginning July 1<sup>st</sup>. 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.)

**J. SIGNATURES**

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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:** \_\_\_\_\_