



# Ivy Bridge College

OF TIFFIN UNIVERSITY

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## Financial Aid Appointment Checklist

### Documents Needed

Prior to the financial aid appointment, please collect information of income earned in the year prior to when you will start school. **You may also need records of your parent's income information if you are considered to be a dependent student.**

### Am I a dependent or independent student?

- If you are not sure of your dependency status, answer the questions listed below. If you answer **no** to **all** of the following questions, you will need to have records of your parent's income. If your parents are not married, you will need to use the income of the parent that you received the most support from in 2009.
  - Were you born before January 1, 1987?
  - At the beginning of the school year 2010-2011 will you be working on a master's degree or doctorate program (such as a MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc)?
  - As of today are you married? (Answer "yes" if you are separated, but not divorced.)
  - Do you have children who receive more than half of their support from you?
  - Do you have dependents (other than children or spouse) who live with you and receive more than half of their support from you, now and through June 30, 2011?
  - Are (a) both of your parents deceased, or (b) are you (or were you until age 18) a ward or dependent of the court?
  - Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
  - Are you a veteran of the U.S. Armed Forces?

### Please have the following documents ready for your financial aid appointment. If you are unable to find these documents, please contact your financial aid counselor at 866-944-4228.

- Your Social Security Number
- Your Driver's license
- Your 2009 W-2 Forms and other records of money earned
- Your (and your spouse's, if you are married) 2009 Federal Income Tax Return.
  - IRS 1040, 1040A, 1040 EZ
  - Foreign Tax Return, or
  - Tax return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federal States of Micronesia, or Palau
- Your Parents' 2009 Federal Income Tax return (only if you are a dependent student)
- Your 2009 W-2 Forms and other records of money earned
- Your 2009 untaxed income records
  - Social Security
  - Temporary Assistance for needy families
  - Welfare
  - Veterans benefits records
- Your current bank statements
- Your current business and investment mortgage information, business and farm records, stock bond, and other investment records
- Your alien registration or permanent resident card (if you are not a U.S. citizen)

**If you have any questions or need assistance, please contact us at our toll-free number at 866.944.4228.**