

DARTMOUTH COLLEGE FINANCIAL AID OFFICE

APPLICATION INSTRUCTIONS ✧✧ RENEWAL FINANCIAL AID 2009-2010

DEADLINES:

Free Application for Federal Student Aid (FAFSA).....February 15, 2009

Renewal Financial Aid Application/Federal Verification Worksheet.....April 1, 2009

Scholarship Data WorksheetApril 1, 2009

Parents' and Student's Signed 2008 Federal Income

Tax Returns (all pages and schedules).....April 1, 2009

Parents' 2008 W-2 Forms.....April 1, 2009

(See College Board IDOC Process instructions for tax returns and Renewal Application/ Federal Verification Worksheet on page 2)

Application Procedures: To apply for financial aid for summer, fall, winter, and spring terms of the 2008-2010 academic year, you must file the following documents by the appropriate deadlines:

- **Free Application for Federal Student Aid (FAFSA):** If you and your parent(s) previously received a PIN and you both know your PIN, go to www.fafsa.ed.gov on or after January 1, 2009, to complete your 2009-2010 **Renewal FAFSA** on the Web. Electronic filing and signing your Renewal FAFSA will allow your application to be processed faster and more accurately.
- If you or your parent(s) previously received a PIN and you are not sure what it is, you may request a duplicate copy of your PIN by going to www.pin.ed.gov and selecting the option "**Request a Duplicate PIN.**" You should be able to receive a PIN immediately. When you use your PIN to access your 2009-2010 **Renewal FAFSA** on the Web, you will be prompted to select and answer a challenge question and agree to the terms and conditions of PIN usage. To protect the confidentiality of your application data, you should never share your PIN with anyone.
- Continuing students are not required to submit a CSS Profile. However, **if you are a first-time, upperclass applicant for financial aid**, you must register and complete a *CSS/Financial Aid PROFILE Application* on-line at: <http://profileonline.collegeboard.com>.
- **After** completing the FAFSA, download and complete both the Dartmouth Renewal Financial Aid Application/Federal Verification Worksheet from the Dartmouth website: <http://www.dartmouth.edu/apply/financialaid/continuing/uspermres.html>.

Your financial aid application cannot be considered complete or processed until we have received FAFSA information electronically from the Federal Processor and all other required documents. If application materials are late, you may have difficulty checking in for your next term of enrollment. Extensions will be granted only in extremely rare cases.

The IDOC PROCESS

Rather than sending your renewal application, the federal verification worksheet, your tax returns, your parents' tax returns, and W-2 forms to the Financial Aid Office at Dartmouth, we ask that you submit this documentation **in one packet** to the **College Board Institutional Documentation Service (IDOC)**.

In early February, you will receive an email notification from the College Board providing instructions for submitting all required paperwork. The notification will provide instructions on how to print a copy of your IDOC cover sheet which must be included for accurate and timely processing. The IDOC cover sheet includes a "bar code" specific to you. This code ensures the scanned documents are maintained in a secure file specific to you. You must mail **all** information in **one** packet to the College Board **along with the completed and signed IDOC Cover Sheet**. The website for additional IDOC information is <https://idoc.collegeboard.com>.

- **2009-2010 Dartmouth Renewal Application/Federal Verification Worksheet**-available at <http://www.dartmouth.edu/apply/financialaid/continuing/uspermres.html>.
- **Parents' and Student's 2008 Federal Tax Returns and W-2s.** Signed copies of **all pages and schedules** should be submitted directly to the **College Board** as soon as completed, but no later than **April 1, 2009**. The **student's name, class, and Social Security number should be written at the top of page 1**. If you or your parents will be filing an extension, submit a copy of the extension request (*Form 4868*) together with 2008 W-2s.
- **Noncustodial Parent's 2008 Federal Tax Returns and W-2 Forms.** If your parents are separated or divorced, your noncustodial parent must submit a **signed** copy of all pages and schedules of the 2008 federal income tax return and W-2 form(s) with the signed IDOC cover sheet to The College Board. Please provide your noncustodial parent with a copy of the IDOC coversheet.
- **Business and Farm information.** If either parent is self-employed or owns a business or farm, he/she should submit the following document(s) based on the business/farm type. Documents are required for each business/farm owned and should be sent to IDOC by April 1, 2009, along with the renewal application, federal verification worksheet, and personal tax returns. ***If one or both of your parents are self-employed and they file a Schedule C, a business/farm supplement is not required. However, a copy of Schedule C must be included in your packet together with their federal tax return.***

• Sole Proprietorship	• Schedule C of your 2008 federal tax return
• Partnership	• Schedule E, K-1's, and Partnership Tax return
• S Corporation	• Schedule E and Corporate Tax Return
• C Corporation	• Corporate Tax Return

- If a new business or farm was created in 2008, your parent(s) should submit a **Business/Farm Supplement** for each. The form can be downloaded from the Dartmouth website: <http://www.dartmouth.edu/apply/pdfs/0910businessfarm.pdf>

When the College Board receives your documents, they will electronically image and transmit the documents to the Dartmouth College Financial Aid Office. All information should be submitted to the College Board even if the information is completed after the April 1, 2009 deadline.

Please do not fax or mail 2008 federal tax returns or any application materials to our office for the 2009-2010 academic year unless specifically asked to do so.



DARTMOUTH COLLEGE FINANCIAL AID OFFICE

RENEWAL FINANCIAL AID APPLICATION FEDERAL VERIFICATION WORKSHEET 2009-2010

After filing the *Free Application for Federal Student Aid (FAFSA)* by **February 15**, complete and return this form to the College Board via the IDOC process by **April 1, 2009**. **Do not complete this form before completing and signing the FAFSA.**

Name _____ ID# _____
Last First Middle

Permanent Address _____ Phone (____) _____
Street

City _____ State _____ Zip _____

College Phone _____ Hinman Box _____

FAX # (____) _____ Send C/O _____

Student Information:

1. **Are you required to file a 2008 U.S. income tax return?** Yes No

If yes, include a signed copy of all pages in your package sent to the College Board using the IDOC cover sheet.
If no, complete the following entering "0" or "none" if there were no earnings in 2008:

List each 2008 employer and source of income (including Dartmouth wages and/or stipends):	AMOUNT RECEIVED:
_____	\$ _____
_____	\$ _____
_____	\$ _____
Interest and/or dividend income:*	\$ _____

*If interest income on your tax return indicates assets higher than those reported on the FAFSA, we will use the higher imputed figure and put a message on your award. If you believe that this imputed amount is incorrect, you must provide documentation of your assets as of the date you signed the FAFSA.

2. List the following assets (held by you or in trust for you)*

a. Trust funds -Trustee: (_____) \$ _____

b. Uniform Gift to Minor – donor: (_____) \$ _____

3. Resources for 2009-10:

- a. From your custodial parents or guardians \$ _____
- b. From your noncustodial parent (if applicable) \$ _____
- c. From outside scholarships (list sources): \$ _____

- d. From VA, gifts, tuition aid programs, other (circle one) \$ _____
- e. Expected payment from a prepaid tuition program \$ _____

Family Information:

4. Father _____ Mother _____
 Home address _____ Home address _____

 Employer _____ Employer _____
 Title/Position _____ Title/Position _____
 Business phone _____ Business Phone _____
 FAX# _____ FAX# _____
 E-mail address _____ E-mail address _____

5. Parent to contact if there are questions with regard to Financial Aid Application: Father _____ Mother _____

6. If parents are divorced, is either remarried? Mother? _____ When? _____
 Father? _____ When? _____

7. Child Support Received by Custodial Parent:

	<u>Received in 2008</u>	<u>To Be Received in 2009</u>
Child support for all children	\$ _____	\$ _____
Child support for student applicant	\$ _____	\$ _____

8. Parents' Untaxed Income:

<u>Social Security benefits received by custodial family members in 2008</u>		<u>To Be Received in 2009</u>
By parents	\$ _____	\$ _____
By other children	\$ _____	\$ _____
By applicant	\$ _____	\$ _____

Other untaxed income (such as welfare benefits, housing allowances, and Workers' Compensation):

<u>Source</u>	<u>Received in 2008</u>	<u>To Be Received in 2009</u>
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

9. Primary Home: Purchase Date _____ Purchase Price _____
 Current Value _____ Current Debt* _____
 *include 1st mortgage, 2nd mortgage and home equity loan, if applicable

10. Total of Unreimbursed Medical Expenses Paid in 2008 \$ _____

Limited Power of Attorney

Limited Power of Attorney: I hereby appoint the Director of Student Financial Services my legal attorney for the sole purpose of endorsing checks made payable to me from a lender or scholarship donor. Representing proceeds of grants, scholarships and/or loans for my educational expenses at Dartmouth College, Student Financial Services will deposit the checks as a credit to my student account. I understand that this power will remain in effect as long as I am a student at the College, unless I rescind it by submitting a signed statement to the Financial Aid Office.

Authorization: Yes No

2009-2010 Authorization Form

Academic period: July 1, 2009 to June 30, 2010

Institutional Charges: I, the student, (and we, the parents, in the case of a Federal PLUS loan) authorize Dartmouth College to apply Federal Title IV financial aid funds to allowable institutional charges such as tuition, room, board and required fees and also to other educationally related expenses which might be posted to my student account. Examples of other charges are computer software and equipment, health insurance and other medical expenses, late payment fees and bad check fines, books and fraternity/sorority/coed society house dues. I understand that this authorization can be rescinded at any time by submitting a signed statement to the Financial Aid Office.

Title IV Credit Balance: If I/we have a credit balance exceeding tuition, room and board created by Federal Title IV funds (not institutional or private funds), I authorize Dartmouth College to hold the funds in my student account until the subsequent billing period. Any interest earned on Title IV credits is used to defray the general operating expenses of the College. If I/we wish to receive the Title IV credit balance (student funds to the student and Federal PLUS loan funds to the parents), I/we will notify the Student Accounts Office in writing, and it will be provided within 14 days of receiving the request.

Authorization: Yes No

I/we declare that the information reported on this form is true, correct, and complete and that I/we will send timely word of any significant change in resources, family situation, number of children in post-secondary education, or receipt of outside scholarships. I/we understand that the information provided on this and other documents may be shared with the applicant, with other agencies from which we are requesting aid, and with scholarship donors.

Student Signature: _____ Date: _____

Signature of (step) father/guardian: _____ Date: _____

Signature of (step) mother/guardian: _____ Date: _____

Please submit the completed Renewal Financial Aid Application, along with the IDOC Cover Sheet and all 2008 tax returns and W-2 forms in one packet to the College Board IDOC Service.

Your financial aid application cannot be considered complete until we have received FAFSA information electronically from the Federal Processor and all other required documents. If application materials are late, you may have difficulty checking in for your next term of enrollment. Extensions will be granted only in extremely rare cases.

