



Financial Aid Appointment Materials

1321 Butte St., Suite 101

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530-244-4022

collegeoptions.org

Please obtain an FSA ID for student and one parent at least 3 days prior to the appointment at fsaid.ed.gov

- This will consist of a username and password for both the student and one parent

Materials to bring to your financial aid appointment:

- FSA ID username and password for the student and one parent
- Social Security Numbers and birthdates for the student and the parents
 - Exact spelling of full name as listed on the Social Security card is necessary for FAFSA completion
- If you are not a US citizen, but you are a permanent resident - Your alien registration number or permanent residence card
- If you are an AB540 student, you do not need Social Security information to complete the California Dream Act Application (CADAA)
- For the 2020-2021 school year:
 - 2018 Federal Income Tax Returns for the student and the parents
 - 2018 untaxed income records for the student and the parents such as: pre-tax contributions to qualified retirement plans, tax exempt interest, child support received, housing/food/living allowances, veterans noneducation benefits, etc.
- For the 2019-2020 school year:
 - 2017 Federal Income Tax Returns for the student and the parents
 - 2017 untaxed income records for the student and the parents such as: pre-tax contributions to qualified retirement plans, tax exempt interest, child support received, housing/food/living allowances, veterans noneducation benefits, etc.
- Most recent bank statements (checking, savings, etc.) for the student and the parents
- Most recent stocks, bonds and other investment records for the student and the parents

All the above information is applicable for parent and student, unless student is “independent” (e.g. married, single with children, age 24 or older, etc.), then only student information is required

If you would like to organize your information prior to your appointment, print and complete a FAFSA on the Web Worksheet (Google search FAFSA on the Web Worksheet)