

## Office of Student Financial Aid & Planning 2023-2024 Supplemental Financial Aid Form

Students applying for school need-based financial aid, their spouses (if applicable), and their parents are required to complete all sections, attach requested documentation, and sign this form. Your file will not be considered complete nor can any awards be made until all forms are completed, signed, and received by the Office of Student Financial Aid & Planning. This includes complete 2022 tax forms. Keep copies of all forms you submit for your records. **Financial aid renewal is not automatic. Students must reapply for financial aid each year in which they would like to be considered for assistance.**

**1. Complete the entire application. Do not leave any questions blank. If a question does not apply, note "N/A" in the space provided. Questions left blank will delay the review of your file.**

- Both the student, spouse (if applicable) and the parent(s) must sign this application. If parents are divorced or separated, please submit separate forms for custodial and non-custodial parent. Please be sure that your name, CUID and graduation year are filled in on both the custodial and non-custodial parent form.

Please send completed form to [cumc-sfp@cumc.columbia.edu](mailto:cumc-sfp@cumc.columbia.edu).

**2. 2022 U.S. Federal or Foreign Tax Returns must be submitted by April 18, 2023.**

- **Student, spouse (if applicable) and parent(s) signed 2022 tax returns, including all schedules and W-2s:** Submit a signed copy of IRS 1040 or translated foreign income tax return with all schedules and W-2 forms. If you or your parent(s) file taxes electronically, the filer must still submit a signed copy (in ink) of the tax return. The website for submission is not yet live. We will let student know when our website is updated for 2023-24.
- Students planning to marry during the 2023-24 academic year will need to submit intended spouse's information and taxes
- **Non-tax Filer:** If you, your spouse, and/or your parents are not filing tax returns for 2022, please complete the "Why I Did Not File a Tax Return" form. We will let students know when our website is updated for 2023-24.

### 1. Student General

Student Name \_\_\_\_\_

CU ID \_\_\_\_\_

Graduation Year \_\_\_\_\_

Student Marital Status:     Single     Married     Divorced/Separated     Widowed

Spouse's Name \_\_\_\_\_ Date of marriage or planned date of marriage \_\_\_\_/\_\_\_\_/\_\_\_\_

### 2. Parent General

Are your biological/adoptive parents:

married     separated     divorced     unmarried living together     unmarried living separately     widowed

**Custodial Parent** This is the parent and/or stepparent with whom you reside when not in school. This should be the same as the custodial parent(s) listed on your FAFSA and initial CSS Profile.

**Custodial Parent One**

**Custodial Parent Two**

Father  Stepfather  Legal guardian

Father  Stepfather  Legal guardian

Mother  Stepmother  Other

Mother  Stepmother  Other

Name \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Address \_\_\_\_\_

Telephone (\_\_\_\_) \_\_\_\_\_

Telephone (\_\_\_\_) \_\_\_\_\_

Email \_\_\_\_\_

Email \_\_\_\_\_

**Non-custodial Parent (if applicable)** Complete if biological/adoptive parents are divorced, separated, or unmarried living separately.

**Non-custodial Parent should complete separate form.**

Year of separation: \_\_\_\_\_ Year of divorce: \_\_\_\_\_

Noncustodial Parents Name \_\_\_\_\_

Address \_\_\_\_\_

**3. Household Income**

**2022 Year Income**

**Anticipated 2023 Year Income**

|                             |          |                             |          |
|-----------------------------|----------|-----------------------------|----------|
| Student Earned Income       | \$ _____ | Student Earned Income       | \$ _____ |
| Spouse Earned Income        | \$ _____ | Spouse Earned Income        | \$ _____ |
| Other Taxable Income        | \$ _____ | Other Taxable Income        | \$ _____ |
| Untaxed Income and Benefits | \$ _____ | Untaxed Income and Benefits | \$ _____ |

**2022 Year Income**

**Anticipated 2023 Year Income**

|                             |          |                             |          |
|-----------------------------|----------|-----------------------------|----------|
| Parent 1 Earned Income      | \$ _____ | Parent 1 Earned Income      | \$ _____ |
| Parent 2 Earned Income      | \$ _____ | Parent 2 Earned Income      | \$ _____ |
| Other Taxable Income        | \$ _____ | Other Taxable Income        | \$ _____ |
| Untaxed Income and Benefits | \$ _____ | Untaxed Income and Benefits | \$ _____ |

**4. Amounts and Sources of Untaxed Income**

List the total amounts of all sources of untaxed income received and not reported on a 2022 tax return.

|  | <b>Student/Spouse</b>        | <b>Parent(s)</b>             |
|--|------------------------------|------------------------------|
| Income Earned from Work (if return not filed)  | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |
| Aid to Families with Dependent Children (AFDC) | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |

|                                     |                              |                              |
|-------------------------------------|------------------------------|------------------------------|
| Housing and Other Living Allowances | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |
| Other (Specify source)              | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |
| Other (Specify source)              | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |
| Other (Specify source)              | Amount \$ _____ Source _____ | Amount \$ _____ Source _____ |

## 5. Assets

|   | Student/Spouse  | Parent(s)                                  |
|---|---|--|
| Cash and Savings  | Value at start of 23-24 Academic Year<br>\$ _____   | \$ _____                                   |
| Trusts  | \$ _____  | \$ _____                                   |
| Investments, including Stocks, Bonds, CDs, etc. ( <b>Do not</b> include retirement savings such as pension plans, 401K, 403B, etc.) | \$ _____  | \$ _____                                   |
| Retirement Savings (Pension plans, 401K, 403B, etc.)  | \$ _____  | \$ _____                                   |
| Housing   | If you own your home, please list the market value, original purchase price and mortgage loan balance in section 8 below. | Parent housing please complete table below |

|  |  |   |
|--|--|---|
| Housing Status<br>Own<br>Monthly Mortgage Amount \$ _____<br>Rent<br>Monthly Rent Amount \$ _____<br>Other (Explain) _____   | Fair Market Value of Home<br>\$ _____        | Primary Mortgage Loan Balance<br>\$ _____ Date _____      |
|  | Purchase Price<br>\$ _____                   | Secondary Mortgage Loan Balance<br>\$ _____ Date _____    |
|  | Year Purchased<br>_____                      | Home Equity Line of Credit Balance<br>\$ _____ Date _____ |
| Other Real Estate<br>Address _____<br>Street _____<br>City _____ State _____ Zip _____   | Fair Market Value of Real Estate<br>\$ _____ | Primary Mortgage Loan Balance<br>\$ _____ Date _____      |
|  | Purchase Price<br>\$ _____                   | Secondary Mortgage Loan Balance<br>\$ _____ Date _____    |
|  | Year Purchased<br>_____                      | Home Equity Line of Credit Balance<br>\$ _____ Date _____ |
| Other Real Estate<br>Address _____<br>Street _____<br>City _____ State _____ Zip _____<br>(If more than two, indicate additional property information as an additional attachment) | Fair Market Value of Real Estate<br>\$ _____ | Primary Mortgage Loan Balance<br>\$ _____ Date _____      |
|  | Purchase Price<br>\$ _____                   | Secondary Mortgage Loan Balance<br>\$ _____ Date _____    |
|  | Year Purchased<br>_____                      | Home Equity Line of Credit Balance<br>\$ _____ Date _____ |

| Business/Farm<br>(Check all that apply) | % of ownership | # of employees | Business Value | Business Debt |
|---|----------------|----------------|----------------|---------------|
| Schedule C Sole Proprietorship*         | _____          | _____          | \$ _____       | \$ _____      |
| Partnership*                            | _____          | _____          | \$ _____       | \$ _____      |
| S Corporation*                          | _____          | _____          | \$ _____       | \$ _____      |
| C Corporation*                          | _____          | _____          | \$ _____       | \$ _____      |
| Farm*                                   | _____          | _____          | \$ _____       | \$ _____      |

\*Submit corresponding tax return.

## 6. Family Information

In the family grid below, please list the name, age, and relationship for each family member living in your household. **You should always include yourself, spouse (if applicable), parents and your dependent children.** Also, include siblings and other relatives for whom you and/or your parents will be providing more than half of their support from July 1, 2023 to June 30, 2024.

| Name | Age | Relationship to Student |
|------|-----|-------------------------|
| 1.   |     | Self                    |
| 2.   |     |                         |
| 3.   |     |                         |
| 4.   |     |                         |
| 5.   |     |                         |
| 6.   |     |                         |

Check here if there are more than six family members and list in section 8.

Will any of the above family members (besides your parents) attend college in the 2023–2024 academic year? If yes, provide the following information for each family member. Include college information only if enrolled full-time in a degree granting program. Verification of sibling(s) enrollment in college for the 2023–2024 academic year will be required in September 2023. Adjustments will be made for siblings whose attendance plans change from the time you complete this.

| First and Last Name of Family Member | Relationship | Age | Name of College | Undergrad or Grad |
|--------------------------------------|--------------|-----|-----------------|-------------------|
| 1. Student                           |              |     |                 |                   |
| 2.                                   |              |     |                 |                   |
| 3.                                   |              |     |                 |                   |
| 4.                                   |              |     |                 |                   |

## 7. Outside Scholarship/Resource Information

Please list the name and annual amount of any outside scholarship or tuition benefit that you have been awarded for the 2023–2024 academic year. Be sure to indicate if the scholarship is renewable for future years. Attach a copy of the notification/award letter.

| Name of Scholarship or Resource | Source/Agency | Amount for 2023–2024 | Renewable  |
|---------------------------------|---------------|----------------------|--|
| 1.                              |               |                      | <input type="checkbox"/> yes <input type="checkbox"/> No |
| 2.                              |               |                      | <input type="checkbox"/> yes <input type="checkbox"/> No |
| 3.                              |               |                      | <input type="checkbox"/> yes <input type="checkbox"/> No |

## 8. Additional Information and Special Circumstances

Use the following space to answer any questions more completely or to explain any special circumstances you wish to bring to the attention of your Financial Aid Officer. Please be as specific as possible, including dates, dollar amounts, and provide documentation when appropriate.

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## 9. Statements and Signatures

I, the student, we, the parents, and student's spouse (if applicable) certify that all information presented is correct at this time and that I/we will send timely notice of any significant change in my/our family situation, family income or assets, or upon receipt of other scholarships or grants.

The student and at least one parent (and the student's spouse, if applicable) must sign this form. Typed signatures are not accepted.

Student's Signature \_\_\_\_\_ Parent's Signature \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Parent's Signature \_\_\_\_\_

Date \_\_\_\_\_ Date \_\_\_\_\_