

How to do your own Financial Aid Forms

Learning about the financial aid process is important for your family. It is complex and requires a lot of pre-planning. This is NOT an activity for students as the amount you pay each year will be based (most times) on your first filing year (base year). We offer filing services for a select number of parents each year. If you are a current client your family has first priority. Nevertheless, we encourage parents that want to learn to file their own financial aid or feel confident with the process to follow the steps below.

1. **Create Federal FSA ID's + passwords** for each student and at least one parents. These ID's are used to access the FAFSA, sign the FAFSA, sign Federal loans and more. Go to www.FSAID.ed.gov to create these ID's
2. **Start your FAFSA** at www.FAFSA.ed.gov for each student after October 1, 2018. Complete and submit using 2017 tax information. This FAFSA will be used for students attending college Fall 2019. Send to every college on your list.
3. **Start the CSS PROFILE form** if your colleges require this application. About 600 private colleges require the CSS PROFILE form in order to award merit or need based aid. View the colleges that require the CSS PROFILE and start the application at www.CSS.CollegeBoard.org . You will need your student's user name and password for College Board (hint it's the one they use to register for the SAT).
4. **Start the NON-Custodial CSS PROFILE form** if you are required. For divorced or separated parents, some CSS PROFILE colleges require the NON-Custodial CSS PROFILE form in addition to the primary CSS PROFILE form. When you complete the primary CSS PROFILE form (for the custodial parent) you will be asked for the NON-Custodial parent's contact information and an email with instructions will be sent to this parent via email ONLY.
5. **Other Forms that might be required?** Colleges could ask your student to complete Verification forms, Institutional forms or request copies of W-2's, 1040 tax returns, Schedule K, A, C. **IMPORTANT** these request typically go to the student's email given to them by the college.