



**Financial Aid Office**

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**2023-2024 Financial Aid Application for Domestic Students**

Financial aid renewal is not automatic; students must reapply each year. All financial aid awards will be determined based on full-time enrollment (12.00 units per term); fall and spring. U.S. citizens & eligible non-citizens are also required to file a **2023-2024 FAFSA**. Members of religious orders must provide a letter of support from their superior(s). Submit the application by mail or email encrypted PDF attachments to [finaid@gtu.edu](mailto:finaid@gtu.edu). **IMPORTANT NOTE:** An aid offer cannot be finalized until all requisite materials have been correctly completed, signed and received.

**APPLICANT INFORMATION**

List your legal name as it appears on your social security card, birth certificate, or equivalent: \_\_\_\_\_  
Last First Middle Initial

Preferred Name \_\_\_\_\_ Social Security Number (if applicable) \_\_\_\_\_ Date of Birth (mm/dd/yyyy) \_\_\_\_\_

Email address \_\_\_\_\_ Telephone Number \_\_\_\_\_

Program of Study (select only one): *Need-based aid is available to students in years one and two paying per credit tuition (up to a maximum of 48 credits)*

- Common Master of Arts (MA) \_\_\_\_\_ Units: Fall 2023: \_\_\_\_\_ Spring 2024: \_\_\_\_\_  
School of Affiliation
- Doctor of Philosophy (PhD) \_\_\_\_\_  
Year in program

**I. HOUSEHOLD INFORMATION**

Are you a U.S. Citizen?  Yes, I am a U.S. citizen (U.S. national)  No, but I am an eligible noncitizen  No, I am not a U.S. citizen or eligible noncitizen

Are you a veteran of the U.S. armed forces?  Yes  No

Are you interested in being considered for federal work-study?  Yes  No

What is your marital status as of today?  Single  Married/Remarried  Separated  Divorced or Widowed

What is the month and year you were married, remarried, separated, divorced or widowed? \_\_\_\_\_  
Month Year

For 2021, what is or will be your federal IRS tax filing status according to your tax return?

- Single
- Head of Household (if you are unmarried and provide a home for certain other people)
- Married – filed joint return (if you were married at the end of 2020, even if you didn't live with your spouse at the end of 2020)
- Married – filed separate return (if you were married at the end of 2020 but filed a separate return)
- Qualifying widow(er)
- Not required to file an IRS federal tax return

Please list yourself and all individuals who live with you in the U.S. **ONLY IF** you (*and/or your spouse*) will provide **at least 51%** of their support between July 1, 2023 and June 30, 2024. Please list the name of the college for any household member who will be enrolled in an eligible degree or certificate program and will be attending at least half-time between July 1, 2023 and June 30, 2024.

	NAMES Student (Spouse & Dependent Children, if applicable)	Age	Relationship to the Student	Name of College the student will attend between 07/01/23 - 06/30/24	Will be Enrolled at least Half-Time
1			<b>SELF</b>	<b>GRADUATE THEOLOGICAL UNION (GTU)</b>	<b>YES</b>
2					
3					
4					
5					
6					
7					

Please provide an annual breakdown of your household living expenses for the 2021 calendar year. Indicate zero "0" where appropriate; do not leave any item blank. The Financial Aid Office may request additional documentation to substantiate reported expenses.

HOUSEHOLD EXPENSES	US DOLLAR AMOUNT	HOUSEHOLD EXPENSES	US DOLLAR AMOUNT
a) Rent or mortgage	USD \$	h) Childcare	USD \$
b) Food	USD \$	i) Child support paid	USD \$
c) Household necessities	USD \$	j) Other expenses (please explain)	
d) Transportation expenses	USD \$		
f) Basic utilities	USD \$		USD \$
g) Out-of-pocket medical/dental	USD \$	<b>TOTAL HOUSEHOLD EXPENSES</b>	<b>USD\$</b>

**II. RESOURCES for EDUCATIONAL EXPENSES**

Please list any of the following resources that you received for the 2021 calendar year (January 1 through December 31, 2021)

RESOURCES	US DOLLAR AMOUNT	ACCEPTABLE DOCUMENTATION
a) Self-Support	USD \$	Copies of W2s, 1099, and/or other income documentation for each source of income
b) Relatives and/or Friends or Private Sponsors	USD \$	Letter(s) stating intention to provide support including the amount and duration and bank statement(s) or letter(s) from sponsors
f) Employer Tuition Assistance	USD \$	Letter(s) indicating type, duration and amount of support
g) State and/or Government Assistance	USD \$	Letter(s) indicating type, duration and amount of support
h) AmeriCorps	USD \$	Letter(s) indicating type, duration and amount of support
i) Vocational Rehabilitation	USD \$	Letter(s) indicating type, duration and amount of support
j) Social Security Benefits (SSB)	USD \$	Benefit Verification Letter
k) Supplemental Security Income (SSI)	USD \$	Benefit Verification Letter
l) Unemployment Compensation	USD \$	Notice of Unemployment Insurance Award
m) Disability	USD \$	Notice of Disability Award
n) Worker's Compensation	USD \$	Statement(s), letter(s), or other types of documented verification of support
o) WIC	USD \$	Statement(s), letter(s), or other types of documented verification of support
p) SNAP/Cal Fresh	USD \$	Letter from County verifying approval of benefits
q) TANF/Cal Works	USD \$	Statement(s), letter(s), or other types of documented verification of support
r) Other Support	USD \$	Statement(s), letter(s), or other types of documented verification of support
<b>TOTAL FUNDING</b>	<b>USD \$</b>	

External resources are considered a part of a student's overall financial aid award package and regarded as self-help. Federal law and institutional policy require all students to report any external resources, not directly awarded by the GTU, which they expect to receive during the 2023-2024 academic year. Please review the [Verification of External Aid Resources](#) for more information.

EXTERNAL GRANTS and SCHOLARSHIPS	Renewable? Yes or No	AWARD disbursed to Student or GTU?	ANTICIPATED AMOUNT Fall 2023	ANTICIPATED AMOUNT Spring 2024
			\$	\$
			\$	\$
			\$	\$
			\$	\$

**III. INCOME - Report value of the items below as of the date you filed the FAFSA**

Report your (and your spouse if married) earnings for Calendar Year 2021 (January 1 – December 31, 2021) and total cash, checking, savings accounts and net worth of investments as of the day you completed the FAFSA. Indicate zero "0" where appropriate. All questions in this section must be answered and will be considered *incomplete* if items are left blank.

Report annual amounts from 2021 Indicate zero "0" where appropriate; do not leave any item blank	Student	Spouse
Enter your adjusted gross income (AGI) for 2021? Adjusted gross income is on IRS Form 1040 – line 11	\$	\$
How much did you earn from working in 2021? Wages, tips, and salaries are on the W2 forms or on IRS Form 1040 – lines 1 plus Schedule 1, lines 3 plus 6 + Schedule K-1 (IRS Form 1065) – Box 14 (Code A). If any individual earning item is negative, do not include that item in your calculation.	\$	\$
Enter your income tax for 2021 IRS Form 1040 - Line 22 minus Schedule 2 - line 2. If negative, enter zero.	\$	\$
As of today, what is your total current balance of cash, savings and checking accounts? Do not include student financial aid.	\$	\$
As of today, what is the net worth of your investments, including income from rental property? Do not include your current residence or the value of retirement accounts.	\$	\$
As of today, what is the net worth of your current business and/or investment farms? Do not include a farm that you live on and operate.	\$	\$

**IV. UNTAXED INCOME**

Report untaxed income received by you, and if married, your spouse for Calendar Year 2021 (January 1 – December 31, 2021). Provide annual amounts from 2021 in the section below and indicate zero "0" where appropriate. All questions in this section must be answered and will be considered *incomplete* if items are left blank.

Report annual amounts from 2021 Indicate zero "0" where appropriate; do not leave any item blank	Student	Spouse
Untaxed portions of IRA distributions and pensions from IRS Form 1040 – lines 4a + 5a <i>minus</i> lines 4b+5b. Exclude rollovers. If negative, enter zero.	\$	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value benefits)	\$	\$
Other untaxed income such as workers' compensation, disability, health savings accounts, first time homebuyer tax credit, etc. Do <b>not</b> include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g. cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$	\$
Money received or paid on your behalf (e.g. bills), not reported elsewhere on this form. This includes money that you received from a parent, other relative or other person whose financial information is not reported on this form and that is not a part of a legal child support agreement.	\$	\$

**V. EXPLANATION of SUPPORT**

If your (and your family's, if applicable) household expenses in 2021 are greater than your combined income and resources, please provide a detailed explanation as to how you supported yourself (and your family, if applicable) in calendar year 2021 and how you expect to meet your budget costs in the 2023-2024 academic year.

**VI. FEDERAL INCOME TAX NON-FILERS**

Complete this section if you, and if married, your spouse are not required to file a 2021 federal income tax return. Please note: a new regulatory requirement of the U. S. Department of Education requires applicants who do not file income tax returns, to submit a, "Verification of Non-filing Letter" from the IRS dated on or after October 1, 2022 attesting that a 2021 IRS income tax return was not filed. Filers of foreign tax returns must submit a comparable document.

**Please check the box that applies below:**

- I (and, if married, my spouse) was not employed and had no income earned from work in 2021.
- I (and, if married, my spouse) did not work in the U.S. in 2021, however, I and/or my spouse did work in another country and will submit official documentation from my/our employer(s) indicating the income earned and taxes paid. **Documents must be translated in English and U.S. dollars.**
- I (and, if married, my spouse) was employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and indicate whether an IRS W-2 form or an equivalent document is attached. *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate sheet with your name and Student ID number at the top.* Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

Student	Spouse	Name of Employer	IRS W-2 Attached?	Amount Earned in 2021
x		<i>Suzy's Auto Body Shop (example)</i>	Yes	\$10,000.00
<b>Total Amount of Income Earned from Work in 2021</b>				<b>USD \$</b>

**VII. NON-IRS INCOME TAX FILERS:**

- If you filed an income tax return with Guam, the Commonwealth of Northern Mariana Islands, the Commonwealth of Puerto Rico and the U.S. Virgin Islands you may provide a signed copy of your income tax return that was filed with the relevant tax authority. If the Financial Aid Office has reason to question the accuracy of the information on the signed copy of the income tax return, you must provide a copy of the tax account information issued by the relevant tax authority before verification can be completed;
- If you filed an income tax return with the tax authority for American Samoa you must provide a copy of your tax account information; or,
- If you filed an income tax return with tax authorities not mentioned above, such as a foreign tax authority, and you are unable to obtain the tax account information free of charge, you must provide documentation that the tax authority charges a fee to obtain that information, along with a signed copy of your income tax return that was filed with the relevant tax authority.

I certify that the information on this form is true, correct and complete to the best of my knowledge. The GTU Financial Aid Office has my permission to verify the information reported by obtaining documentation as needed. I understand that if I purposely provide false or misleading information that my financial aid award may be withdrawn. Furthermore, I understand that my financial aid award is to be used solely for admissible educational expenses and is subject to revision based upon changes to any of the information provided on the FAFSA and/or this form and that all institutional aid awards are subject to the availability of funds. I understand that if I borrow a federal direct loan, I am responsible for repayment, in accordance with the signed Master Promissory Note, even if I do not finish my program of study at the GTU.

**WARNING:** Any person who knowingly makes a false statement or misrepresentation on this form or on any accompanying document is subject to penalties that may include fines, imprisonment, or both, under the U.S. Criminal Code and 20 U.S.C. 1097.

My signature below designates authorization to the use of electronic means of communication for official notification concerning my financial aid information. I have the right to withdraw consent at any time by written notice to the GTU Financial Aid Office.

Student's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**\*\*PLEASE KEEP A COPY FOR YOUR RECORDS\*\***



## Financial Aid Rights and Responsibilities

### **Students who receive financial assistance are agreeing that they have read, understood and will comply with the obligations and conditions listed below and all applicable institutional and federal regulations.**

- You understand that you must be a degree-seeking student at the GTU. Prospective student applications will be reviewed after the Financial Aid Office has been notified of your admission to an eligible degree program. Applications received after a priority deadline may be delayed by a minimum of three to six weeks.
- You must provide accurate information. Intentionally misreporting information used to determine financial aid eligibility is a violation of federal law and could be a criminal offense, which may be subject to penalties that include fines, imprisonment, or both under the US Criminal Code and 20 U.S.C. 1097.
- An offer will be made in accordance with all current laws, regulations and appropriations of the federal government and the institution in effect at the time of the calculation and the availability of funds. The Financial Aid Office reserves the right to modify, reduce or withdraw an offer in the event of changes in your financial status and/or eligibility for aid, if institutional policies or federal laws are amended. Additionally, financial aid may be cancelled if the aid offered was based on any unintended error.
- You agree to use the GTU Net Partner Student Portal to accept and/or decline your aid offer electronically. You may contact the Financial Aid Office regarding alternative methods of communication and you can rescind your permission at any time. All financial aid matters will be communicated by email to your preferred email if you are an applicant or your school email account if you are a returning student.
- You understand that an offer of financial aid and determination of your award is for the 2023-2024 nine-month academic year or four-and a half month academic term and that offers of financial aid are contingent on the availability of funds. If you enroll for fewer units than estimated or drop classes which bring you below full-time enrollment, your award will be adjusted accordingly or withdrawn completely. Funding is not guaranteed for increased enrollment. Furthermore, you understand you must re-apply and reestablish eligibility for financial aid each award year.
- You understand that you may explore other opportunities for assistance. We encourage you to make use of the GTU [Guide to External Scholarships and Resources](#) to research other funding sources that may support your education and help to reduce the need to borrow loans.
- You understand that you must report any additional financial assistance missing on your offer notice, such as scholarships, vocational rehabilitation funds, AmeriCorps, fellowships and employer tuition assistance. Additional assistance received may result in an adjustment, cancellation or required repayment of an award if additional aid exceeds your demonstrated financial need or cost of attendance.
- You will inform the Financial Aid Office of any changes in your financial circumstances, favorable as well as unfavorable, that occur within the award period. You may request a recalculation of your financial need if there is a substantial change in your financial circumstances. However, this may not result in an increase in financial aid.
- If required, you must provide verification documents requested within two weeks of the time of the request or your offer will be subject to delay. An award will be adjusted or canceled if aid eligibility changes as a result of this process.
- You cannot receive financial aid from two schools at the same time for the same semester.
- If a Federal Work Study (FWS) offer is included in your aid package, before beginning employment, a FWS Authorization form and a current job description must be filed with the Financial Aid Office and employment documents must be completed with Human Resources. Work-study employment is contingent upon availability of funds and is not guaranteed.
- Recipients of federal student loans must complete the online entrance counseling and the annual student loan acknowledgement requirements before receiving any funds. These requirements may be completed at <https://studentaid.gov/>.
- You understand that once financial aid funds are available for payment, financial aid will be credited to your student account to pay for your mandatory tuition/fees and any other outstanding obligations related to your educational expenses by the established deadline. If your financial aid disbursement does not cover the balance due, you are responsible for the payment.
- You acknowledge that a condition to receive financial aid requires that you maintain Satisfactory Academic Progress (SAP) standards according to policies established by the institution that are compliant with federal regulations.
- If you are awarded a merit-based scholarship and fall below the scholarship criteria, you may be responsible for repayment of the scholarship.
- According to federal regulations, if you withdraw or stop attending all classes (i.e., take a leave of absence) prior to completing 60% of any semester for which you have received a federal Direct Loan, awards may be adjusted in accordance with the refund policy and you may be required to repay all or a portion of any federal funds disbursed based on the Return to Title IV (R2T4) calculation as required by federal law. Recalculations of your financial aid may cause a balance due and you are responsible for reviewing your student billing account statement to determine if you owe a repayment of a federal Direct Loan or other type of financial aid. Any credit refund that you have received may be returned to the US Department of Education and your federal loan servicer(s) will be notified of your less than half-time enrollment status. Federal regulations require active participation in courses in order to be eligible for federal funds.
- Recipients of federal student loans must complete mandatory exit counseling prior to separation either by graduation, less than half-time enrollment, leave of absence, withdrawal or termination.