

## *Session Plan*

### *Workplace Responsibilities*

**Area:** Financial Aid Dependency, Eligibility, Documentation

**Time:** 45 Minutes

**Standards:** Take Action: Transition B – Complete and submit financial aid application

**Purpose/Goal:** Students will learn the requirements for successfully completing the FAFSA, including their dependency status criteria and how it impacts their FAFSA application.

**Materials Needed:**

- College Expenses and Financial Aid - How much do you know? (English and Spanish) worksheet (pgs. 3-4)
- Financial Aid PowerPoint (English and Spanish) – (Available as a separate download on the CAO and gedplus.net websites)
- Documents Needed for FAFSA Sheet (English and Spanish) (pgs. 5-6)

**Evidence of Growth:**

Students will demonstrate learning in the following ways:

- Identify eligibility requirements in order to complete FAFSA
- List documents needed to successfully complete FAFSA
- Identify their dependency status criteria

**Agenda:**

**Opening:**

Start by saying “Let’s see how much you know about college expenses and financial aid. Take five minutes to brainstorm and answer the following questions. Just guess if you’re not sure and have fun.” You will review the answers as you go through the Powerpoint.

**Activities:**

- Begin the PowerPoint presentation. Remember to review college expenses worksheet while proceeding with the slides. Allow students the opportunity to ask questions before proceeding to the next slide.
- Before discussing the seven steps of financial aid, inform students that they can speak with him/her about individual situations after the workshop. (Typically students will ask questions about their dependency status).
- At the end, Facilitator will say: “Now that you have learned about the financial aid process, you can feel free to sign up for individual appointments to complete your applications. Use the “Documents needed checklist” in order to be prepared for your session.

**Closing Facilitator Talk:**

Check for understanding by discussing the following with students:

- Did you change any of your answers to the College Expenses worksheet from what you had written down initially before the presentation to now that you have learned about Financial Aid? If so, what changed?
- Who can tell me one of the steps for filing for financial aid?
- What are the two types of financial aid applications?

**Additional Resources:**

FAFSA website: <http://www.fafsa.ed.gov>

Name: \_\_\_\_\_

**College Expenses & Financial Aid**  
**How much do you know?**

1. Create a list of **College Expenses**.
  
  
  
  
  
  
  
  
  
  
2. Brainstorm a list of possible **funding for College Expenses (Types of Financial Assistance)**.
  
  
  
  
  
  
  
  
  
  
3. Name the **two most popular applications for Financial Aid**.
  
  
  
  
  
  
  
  
  
  
4. Approximately, what is the total cost of **yearly full time tuition at ( Estimation)**:

**CUNY 4 Year College =** \_\_\_\_\_

**CUNY Community College =** \_\_\_\_\_

**SUNY 4 Year College =** \_\_\_\_\_

**Private 4 year college (Examples = Mercy, NYU, St. Johns) =** \_\_\_\_\_

Nombre: \_\_\_\_\_



## Los Gastos Universitarios y Ayuda Financiera Cuanto sabes?



Crear una lista de los gastos universitarios:

- Haga una lista de posible financiación para los gastos universitarios (Tipos de Asistencia Financiera):
- Cuales son las dos aplicaciones más populares para Ayuda Financiera:
- Aproximadamente, ¿Cuál es el costo total de la matrícula anual a tiempo completo en (Estimación):

CUNY (NYC) Senior College (4 años) = \_\_\_\_\_

CUNY (NYC) Community College (2 años) = \_\_\_\_\_

SUNY College (NYS) (4 años) = \_\_\_\_\_

Privada 4 años de universidad (Ejemplos = Columbia University, St. Johns University) =

\_\_\_\_\_

## List of Documents Needed to Successfully Complete FAFSA

### Students

- Your Social Security card. It is important that you enter your Social Security Number correctly!
- Your driver's license (if any)
- Your 2012 W-2 forms and other records of money earned
- Your IRS 1040, 1040A, 1040 EZ (and if married, your spouse's) 2012 Federal Income Tax Return
- Foreign Tax Return, or
- Tax Return for Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federal States of Micronesia, or Palau

### Parents or Legal Guardians

- Your Parents' 2011 Federal Income Tax Return (if you are a dependent student)
- Your 2011 untaxed income records
- Your current bank statements
- Your current business and investment mortgage information, business and farm records, stock, bond and other investment records
- Your alien registration or permanent resident card (if you are not a U.S. citizen)

## Lista de Documentación Necesaria Para Completar La Aplicación de FAFSA

### Estudiantes

- Su tarjeta de Seguro Social. Es importante que introduzca su número de Seguro Social correctamente!
- Su licencia de conducir (Si tienes)
- Sus formularios W-2 y otros registros de dinero ganado
- Su IRS 1040, 1040A, 1040 EZ declaración de Impuestos Federales (y si casado, su cónyuge)
- Declaración extranjera, o
- Declaración de Impuestos de Puerto Rico, Guam, Samoa Americana, las Islas Vírgenes de EE.UU., las Islas Marshall, los Estados Federados de Micronesia, o Palau

### Padres o Tutores Legales

- Declaración de Impuestos Federales de sus padres (si usted es un alumno dependiente)
- Sus registros de ingresos no tributables
- Los estados de cuenta bancarias actuales
- Su información de negocios actual y inversión de hipoteca de las empresas, registros de la granja, acciones, bonos y otros registros de inversión (si aplicable)
- Su registro de extranjero o tarjeta de residencia permanente (si no es ciudadano de EE.UU.)