

FOLLOW THE STEPS BELOW TO DEVELOP YOUR PERSONALIZED FINANCIAL PLAN. CHECK OFF THE BOXES AS YOU COMPLETE EACH OF THE ITEMS.

1. GET PREPARED

- Make the most of your financial aid options by checking on your employer education benefits and other resources alongside federal student aid.
- Determine your eligibility for federal student aid and review the programs.
 - Review eligibility requirements for Federal Student Aid at <https://studentaid.gov/understand-aid/eligibility/requirements>
- The FUTURE Act - Direct Data Exchange (FA-DDX) will replace the IRS Data Retrieval tool and will be required to automatically transfer tax data from your completed 2022 tax form directly into the FAFSA® via the IRS to help ensure accuracy. Based on your answers to the marital or dependency questions on the FAFSA®, your spouse, parent or any required contributors may also need to provide federal tax information.
- Determine your dependency status. Use the “Dependency Status” questions on the second page of this checklist to see whether you are an independent or dependent student.

2. APPLY FOR FINANCIAL AID

- Create your Federal Student Aid (FSA) ID.
 - Visit <https://studentaid.gov/fsa-id/create-account> and follow the on-screen instructions to apply or request an FSA ID. If you are a dependent student both you and a parent or any other contributors will need an FSA ID to gain access to and electronically sign your FAFSA®.
- Complete the FAFSA® online at <https://studentaid.gov>.
 - Undergraduate and graduate students should include DeVry University and its Keller Graduate School of Management’s school code: **010727**.
 - After completing your FAFSA®, save or print the FAFSA® Confirmation Page for your records.
 - If you have already completed a FAFSA® for another school, click on “Make a Correction to a Processed FAFSA®” and add DeVry’s school code to the top.

3. MEET WITH YOUR STUDENT SUPPORT ADVISOR TO DISCUSS YOUR PERSONALIZED FINANCIAL PLAN

- Discuss your personalized financial plan and review your next steps.



Appointment Date & Time: _____

SSA Name: _____ Phone _____

- Complete 2024-2025 FAFSA® prior to appointment if using Federal Student Aid.

FEDERAL SCHOOL CODE FOR DEVRY AND KELLER: 010727

FAFSA® is a registered trademark of the U.S. Department of Education. © 2023 DeVry Educational Development Corp. All rights reserved. In New York, DeVry University operates as DeVry College of New York.

WHAT DOCUMENTATION IS NEEDED TO COMPLETE THE FAFSA?

IDENTIFICATION

- Social Security Number and your own mobile phone number and/or email address for you, your spouse or parent(s).
- If you are not a U.S. citizen, documentation of your eligible noncitizen status.

2022 INCOME AND TAX INFORMATION

A contributor is anyone (you, your spouse, your biological or adoptive parent(s), or your parent's spouse) required to provide information on the FAFSA® form. Contributors will be required where possible to access 2022 IRS tax return information to complete your 2024-2025 FAFSA® using the FUTURE Act -Direct Data Exchange (FA-DDX) which was previously the IRS Data Retrieval Tool. This tool will be required for several reasons:

1. It's the easiest way to provide your tax data.
2. It's the best way of ensuring that your FAFSA® has accurate tax information.
3. You shouldn't need to provide a copy of your or your parents' or spouse's tax returns.

If you are unable to use the FUTURE Act - Direct Data Exchange (FA-DDX), you will need 2022 tax information to complete your 2024-2025 FAFSA®. You may also need records of any contributor's income (if you are a dependent student). Please use the following as a guide to gather your documents:

- Your (and your spouse's, if married) 2022 federal income tax return.
- Parents' (biological or adoptive, or parent's spouse) 2022 federal income tax return (if you are a dependent student).
- W-2 forms or other records of income earned.
- Current bank statements and records of stocks, bonds, and other investments.
- Business or farm records, if applicable.
- Records of other untaxed income received, such as federal means benefits, Social Security, or military or clergy allowances.

HOW DO I DETERMINE MY DEPENDENCY STATUS?

The federal government has established how dependency status is determined for federal financial aid purposes. If a student is considered a dependent, his or her parent's income and asset information must be included on the FAFSA®. This information will be used in addition to the student's income and asset information to determine the Student Aid Index (SAI), previously Expected Family Contribution (EFC). If you answer "No" to ALL of the questions, you are a dependent student, answering "yes" to any of the following questions means you are an independent student for the 2024-2025 award year: **YES NO**

- Were you born before **January 1, 2001**?
- As of today, are you married?
- At the beginning of the **2024-2025** school year, will you be working on a master's or doctorate program?
- Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?
- Are you a veteran of the U.S. armed forces?
- Do you now or will have children who will receive more than half of their support from you between **July 1, 2024, and June 30, 2025**?
- Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through **June 30, 2025**?
- At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent/ward of the court?
- As of today, are you an emancipated minor or in legal guardianship as determined by a court in your state of legal residence?
- At any time on or after **July 1, 2023**, were you an unaccompanied youth who was homeless or at risk of being homeless?