

# OKLAHOMA TUITION AID GRANT PROGRAM

## 2011-2012 Application

**Only for students NOT eligible to complete the Free Application for Federal Student Aid (FAFSA)**

Complete your OTAG application form as early after January 1 as possible. The OTAG application receipt deadline for best consideration is March 15. There is no guarantee, however, that funds will be available to award all eligible applications received through March 15. How early you apply can make the difference in whether or not you receive the award.

Mail the completed application to: Oklahoma Tuition Aid Grant Program, P.O. Box 108850, Oklahoma City, OK 73101-8850.

The award process usually begins by June 1, and OTAG will send you an informational letter if you have been awarded. If you are not awarded, OTAG will send you a letter informing you of your non-award status and the reason(s) why you were not awarded.

### Oklahoma Tuition Aid Grant Program Application Form

#### Step 1: Student Information

Student Name <i>Last</i>		<i>First</i>	<i>Middle</i>
<i>Student's Social Security Number</i> (Use only Social Security Number assigned by the Social Security Administration.) <input type="checkbox"/> Check here if you do not have a Social Security Number			
<i>Student's permanent address</i> Number and street (include apt. number)			
<i>City</i>		<i>State</i>	<i>Zip Code</i>
<i>Student's permanent phone number</i> Area Code (    )	<i>Student's date of birth</i> Month/Day/Year		<i>Student's e-mail address</i> (optional)
<i>Marital status as of today</i> <input type="checkbox"/> I am single, divorced or widowed <input type="checkbox"/> I am married/remarried <input type="checkbox"/> I am separated			<i>Month and year you were married, separated, divorced or widowed.</i> Month                  Year
<i>Month and year student began living in Oklahoma</i> Month                  Year		<i>Name of Oklahoma high school from which you graduated</i>	
<i>Name of college, university or career technology center you plan to attend beginning in Fall 2011</i>		<i>When did you first enroll in post secondary education? (Please list the semester and year that you began taking classes after high school graduation).</i>	
<i>What will be your grade level in college when you begin the 2011-2012 school year?</i> <input type="checkbox"/> Freshman <input type="checkbox"/> Sophomore <input type="checkbox"/> Junior <input type="checkbox"/> Senior		<i>Will you have your first bachelor's degree before July 1, 2011?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No	

## Step 2: Whose Income Should be Provided?

Were you born before January 1, 1988?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
At the beginning of the 2011-2012 school year, will you be working on a master's or doctorate program (such as a M.A., MBA, M.D., J.D., Ph.D., Ed.D or graduate certificate, etc.)?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
As of today, are you married? (Answer "Yes" if you are separated but not divorced.)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have children who will receive more than half of their support from you between July 1, 2011 and June 30, 2012?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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, 2012?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you a veteran of the U.S. Armed Forces?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you or were you an emancipated minor as determined by a court in Oklahoma?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are you or were you in legal guardianship as determined by a court in Oklahoma?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
At any time on or after July 1, 2010, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
At any time on or after July 1, 2010 did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
At any time on or after July 1, 2010, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**If you (the student) answered "Yes" to any question in step 2, skip step 3 and continue with step 4. If you answered "No" to all 13 questions in step 2, continue with step 3.**

## Step 3: Parent Household Financial Information

**If you are required to complete this section, please do not skip any questions. If there is no income to report in a particular category, be sure to enter "0".**

What is your parents' marital status as of today? <input type="checkbox"/> Married/Remarried <input type="checkbox"/> Divorced/Separated <input type="checkbox"/> Single <input type="checkbox"/> Widowed		Month and year they were married, separated, divorced or widowed Month                      Year	
Father/Stepfather date of birth Month              Day              Year		Mother/Stepmother date of birth Month              Day              Year	
How many people are in your parents' household?(include yourself)		In which state do your parents reside?	
How many people in your parents' household (do NOT include your parents but DO include yourself) will be college students between July 1, 2011 and June 30, 2012?			
For 2010, have your parents completed their IRS income tax return? <input type="checkbox"/> My parents have completed their return. <input type="checkbox"/> My parents will file, but have not done so yet. <input type="checkbox"/> My parents will not file a tax return.			
If your parents did or will file an IRS income tax return for 2010, what was your parents' Adjusted Gross Income (AGI)? (IRS Form 1040-line 37; 1040A-line 21; or 1040EZ-line 4.)		\$	
If your parents have income from work, even if you have included those amounts in the adjusted gross income above, enter the income from work amounts for your mother or father or both if both worked.		Mother \$	Father \$
Enter the amount of income tax that your parents paid for 2010. Income tax amount is from IRS tax forms. (IRS Form 1040-line 55; 1040A-line 35 or 1040EZ-line 11)		\$	

**Other information about income and/or payments**

Enter total amount received or paid in 2010. Please enter “0” for each category in which no income was received or no payments made.

<i>Child support paid or received.</i>	Paid \$	Received \$
<i>Payments to tax deferred pension or savings plans or IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.</i>		\$
<i>Tax exempt interest income</i>		\$
<i>Untaxed portions of IRA distributions or other pensions. (Exclude rollovers.)</i>		\$
<i>Housing, food and other living allowances paid to members of the military, clergy and others. Don't include the value of on-base military housing or the value of basic military allowance for housing.</i>		\$
<i>Veterans noneducation benefits</i>		\$
<i>Other untaxed income not reported elsewhere on this form.</i>		\$
<i>Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS form 1040-line 49 or 1040A-line 31.</i>		\$
<i>Taxed earnings from need-based employment programs.</i>		\$
<i>Scholarship and Grant aid reported in your parents' adjusted gross income.</i>		\$
<i>Taxed combat pay or special combat pay.</i>		\$
<i>Earnings from work under a cooperative education program offered by a college.</i>		\$

**Additional information**

<i>As of today, what is your parents' total current balance of cash, savings and checking accounts?</i>	\$
<i>As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)? Net worth means current value minus debt.</i>	\$
<i>As of today, what is the net worth of your parents' current businesses and/or investment farms?</i> <b>Do not include a farm that your parents live on and operate or a family business that your parents operate that has less than 100 full time employees.</b>	\$

**Step 4: Student/Spouse Household Financial Information**

All applicants must complete this section. If there is no income to report in a particular category, be sure to enter “0”.

<i>For 2010, have you completed your IRS income tax return?</i> <input type="checkbox"/> I have completed my return. <input type="checkbox"/> I will file, but have not done so yet. <input type="checkbox"/> I will not file a tax return.		
<i>If you did or will file an IRS income tax return for 2010, what was your Adjusted Gross Income (AGI)? (IRS Form 1040-line 37; 1040A-line 21; or 1040EZ-line 4.)</i>	\$	
<i>If you have income from work, even if you have included those amounts in the adjusted gross income above, enter the income from work amounts for you or your spouse or both if both worked.</i>	Student \$	Spouse \$
<i>Enter the amount of income tax that you paid for 2010. Income tax amount is from IRS tax forms. (IRS Form 1040-line 55 1040A-line 35; or 1040EZ-line 11.)</i>	\$	

**Other information about income and/or payments**

Enter total amount received or paid in 2010. Please enter "0" for each category in which no income was received or no payments made.

<i>Child support paid or received.</i>	Paid \$	Received \$
<i>Payments to tax deferred pension or savings plans or IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans.</i>		\$
<i>Tax exempt interest income</i>		\$
<i>Untaxed portions of IRA distributions or other pensions. (Exclude rollovers.)</i>		\$
<i>Housing, food and other living allowances paid to members of the military, clergy and others. Don't include the value of on-base military housing or the value of basic military allowance for housing.</i>		\$
<i>Veterans noneducation benefits</i>		\$
<i>Other untaxed income not reported elsewhere on this form.</i>		\$
<i>Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS form 1040-line 49 or 1040A-line 31.</i>		\$
<i>Taxed earnings from need-based employment programs.</i>		\$
<i>Scholarship and Grant aid reported in your adjusted gross income.</i>		\$
<i>Taxed combat pay or special combat pay.</i>		\$
<i>Earnings from work under a cooperative education program offered by a college.</i>		\$

**Additional information**

<i>As of today, what is your total current balance of cash, savings and checking accounts?</i>	\$
<i>As of today, what is the net worth of your investments, including real estate (not your home)? Net worth means current value minus debt.</i>	\$
<i>As of today, what is the net worth of your current businesses and/or investment farms? Do not include a farm that you live on and operate or a family business that you operate that has less than 100 full time employees.</i>	\$

**Step 5: Complete this step only if you (the student) answered "Yes" to any question in Step 2.**

<i>How many people are in your household?(Include yourself)</i>
<i>How many people in your household will be college students between July 1, 2010 and June 30, 2011?</i>

**Step 6: Signatures**

Application will not be processed without the appropriate signatures.

<i>Student (sign here)</i>	<i>Parent (Parent must sign here if parents' information was entered in Step 3.)</i>
<i>Date this form was completed</i>	
Month	Day
Year	

If you have questions, contact OTAG toll free at 800-858-1840