## OKLAHOMA TUITION AID GRANT PROGRAM

### **2015-2016 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 1. There is no guarantee, however, that funds will be available to award all eligible applications received through March 1. 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. (You will be notified if additional information and documentation are needed.)

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 Last		First			Middle
Student's Social Security Number (Use only Social Security Number assigned by the Social Security Administration.)					
□Check here if you do not have a Soc	cial Security Num	ber			
Student's permanent address					
Number and street (include apt. number)					
City		State	Zip (	Code	
Student's permanent phone number Area Code ( )	Student's date of Month/Day/Year	birth		Stud	ent's e-mail address (optional)
Marital status as of today					h and year you were married,
$\Box$ I am single $\Box$ I am separated	separated, divorced or widowed.  Month Year				
☐ I am married/remarried ☐ I am di	vorced or widowe	d		Mon	n i eai
Month and year student began living in Oklahoma  Name of Oklahoma high school fro which you graduated			school from	Ye	ear of high school graduation
Name of college, university or career technology center you plan to attend beginning in Fall 2015		When did you first enroll in post secondary education? (Please list the semester and year you began taking classes after high school graduation).			
What will be your grade level in college when you begin the 2015-2 school year?  □ Freshman □ Sophomore □ Junior □ Senior			Will you have your first bachelor's degree before July 1, 2015?  □ Yes □ No		

**Step 2: Whose Income Should be Provided?** 

Were you born before January 1, 1992?	□Yes	□No
As of today, are you married? (Answer "Yes" if you are separated but not divorced.)	□Yes	
At the beginning of the 2015-2016 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.)?	□Yes	□No
Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	□Yes	□No
Are you a veteran of the U.S. Armed Forces?	□Yes	□No
Do you have children who will receive more than half of their support from you between July 1, 2015 and June 30, 2016?	□Yes	□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, 2016?	□Yes	□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?	□Yes	□No
Are you or were you an emancipated minor as determined by a court in Oklahoma?	□Yes	□No
Are you or were you in legal guardianship as determined by a court in Oklahoma?	□Yes	□No
At any time on or after July 1, 2014, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?	□Yes	□No
At any time on or after July 1, 2014 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?	□Yes	□No
At any time on or after July 1, 2014, 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?	□Yes	□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 legal parents' marital status as of today?  Mo		Month and v	Ionth and year they were married,		
, ,		•	parated, divorced or widowed		
1		Month	Year		
Parent 1 (Father/Mother/Stepparent) date of birth			t) date of bi	irth	
Month Day Year	Month Day		, ,		
How many people are in your parents'	How many people are in your parents' In which state do your		r parents reside?		
household?(include yourself)					
How many people in your parents' household (do No	OT include your pa	rents but DO	include you	ırself) will be	
college students between July 1, 2015 and June 30, 2	2016?				
For 2014, have your parents completed their IRS income tax return?					
$\square$ My parents have completed their return. $\square$ My parents will file, but have not done			o yet. $\square$ My	y parents will	
not file a tax return.					
If your parents did or will file an IRS income tax return for 2014, what was					
your parents' Adjusted Gross Income (AGI)? (IRS Form 1040-line 37; 1040A-		A-			
line 21; or 1040EZ-line 4.)			\$		
If your parents have income from work, even if you have included those		Parent	1	Parent 2	
amounts in the adjusted gross income above, enter the income from work		rk \$		\$	
amounts for your parents.					
Enter the amount of income tax that your parents paid for 2014. Income		e			
tax amount is from IRS tax forms. (IRS Form 1040-line 56; 1040A-line 39 or		\$			
1040EZ-line 10					

Other information about income and/or payments

Enter total amount received or paid in 2013. Please enter "0" for each category in which no income was

received or no payments made.

Child support paid or received.	Paid	Received
	\$	\$
Payments to tax deferred pension or savings plans or IRA deductions an		
self-employed SEP, SIMPLE, Keogh and other qualified plans.		\$
Tax exempt interest income		\$
Untaxed portions of IRA distributions or other pensions. (Exclude rollover	·s.)	\$
Housing, food and other living allowances paid to members of the milita	ry, clergy and	\$
others. Don't include the value of on-base military housing or the value of basic i		
for housing.		
Veterans noneducation benefits	\$	
Other untaxed income not reported elsewhere on this form.	\$	
Education credits (American Opportunity, Hope and Lifetime Learning tax cre	\$	
form 1040-line 50 or 1040A-line 33.		
Taxed earnings from need-based employment programs.	\$	
Scholarship and Grant aid reported in your parents' adjusted gross inco		
		\$
Taxed combat pay or special combat pay.	\$	
Earnings from work under a cooperative education program offered by	\$	

#### **Additional information**

As of today, what is your parents' total current balance of cash, savings and checking	
accounts?	\$
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.	\$
As of today, what is the net worth of your parents' current businesses and/or investment	
farms?	
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.	

## 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".

For 2014, have you completed your IRS income tax return?			
$\Box$ I have completed my return. $\Box$ I will file, but have not done so yet. $\Box$ I will not file a tax return.			
If you did or will file an IRS income tax return for 2014, what was your			
Adjusted Gross Income (AGI)? (IRS Form 1040-line 37; 1040A-line 21; or			
1040EZ-line 4.)			
If you have income from work, even if you have included those amounts	Student	Spouse	
in the adjusted gross income above, enter the income from work amounts			
for you or your spouse or both if both worked.	\$	\$	
Enter the amount of income tax that you paid for 2014. Income tax amount			
forms. (IRS Form 1040-line 56 1040A-line 39; or 1040EZ-line 10.)	\$		

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

Enter total amount received or paid in 2014. Please enter "0" for each category in which no income was

received or no payments made.

Child support paid or received.	Paid	Received	
	\$	\$	
Payments to tax deferred pension or savings plans or IRA deductions and	Payments to tax deferred pension or savings plans or IRA deductions and payments to self-		
employed SEP, SIMPLE, Keogh and other qualified plans.			
		\$	
Tax exempt interest income		\$	
Untaxed portions of IRA distributions or other pensions. (Exclude rollovers	.)	\$	
Housing, food and other living allowances paid to members of the militar	\$		
others. Don't include the value of on-base military housing or the value of basic r			
housing.			
Veterans noneducation benefits	\$		
Other untaxed income not reported elsewhere on this form.	\$		
Education credits (American Opportunity, Hope and Lifetime Learning tax cred	\$		
1040-line 50 or 1040A-line 33.			
Taxed earnings from need-based employment programs.	\$		
Scholarship and Grant aid reported in your adjusted gross income.	\$		
Taxed combat pay or special combat pay.	\$		
Earnings from work under a cooperative education program offered by a	\$		

#### **Additional information**

As of today, what is your (and spouse's) total current balance of cash, savings and	
checking accounts?	\$
As of today, what is the net worth of your (and spouse's) investments, including real estate	
(not your home)? Net worth means current value minus debt.	\$
As of today, what is the net worth of your (and spouse's) 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.	

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

How many people are in your household? (Include yourself)

How many people in your household will be college students between July 1, 2015 and June 30, 2016?

## **Step 6: Signatures**

Application will not be processed without the appropriate signatures.

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

For assistance or additional instructions, contact OTAG toll free at 800-858-1840