

OKLAHOMA TUITION AID GRANT PROGRAM

2023-2024 Application

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

Complete your OTAG application form as early after October 1 as possible. There is no guarantee that funds will be available to award all eligible applications received through any specific deadline. 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 <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 <input type="checkbox"/> I am separated <input type="checkbox"/> I am married/remarried <input type="checkbox"/> I am divorced or widowed			<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>Year of high school graduation</i>	
<i>Name of college, university or career technology center you plan to attend beginning in Fall 2023</i>		<i>When did you first enroll in post secondary education? (Please list the semester and year you began taking classes after high school graduation).</i>	
<i>What will be your grade level in college when you begin the 2023-2024 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 you begin the 2023-2024 school year?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No

Other information about income and/or payments

Enter total amount received or paid in **2021**. 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 non-education 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-Schedule 3-line 3.</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> 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”.

<i>For 2021, have you completed your IRS income tax return? (circle one)</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 2021, what was your Adjusted Gross Income (AGI)? (IRS Form 1040-line 11)</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 2021. Income tax amount is from IRS tax forms. (IRS Form 1040-line 22 minus Schedule 2-line 2)</i>		\$

Other information about income and/or payments

Enter total amount received or paid in **2021**. 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 non-education 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-Schedule 3, line 3.</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 (and spouse's) total current balance of cash, savings and checking accounts?</i>	\$
<i>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.</i>	\$
<i>As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms?</i> 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.

<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, 2023 and June 30, 2024?</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

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