OKLAHOMA TUITION AID GRANT PROGRAM

2024-2025 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. Due to the decentralized nature of the program, there is no guarantee eligible students will be awarded.

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/or documentation are needed.)

The award process usually begins by June 1, and OTAG will send you an informational letter if you are eligible to be considered by an institution for the award. If you are not eligible, OTAG will send you a letter informing you of your ineligibility.

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 Social Security Number					
Student's permanent address Number and street (include apt. number)					
City		State	Zip	p Code	
Student's permanent phone number Area Code ()	Student's date of birth Month/Day/Year			Stud	dent's e-mail address (optional)
Marital status as of today □ I am single □ I am separated □ I am married/remarried □ I am div	d			ath and year you were married, wrated, divorced or widowed. hth Year	
Month and year student began living in Oklan Month Year	klahoma high s graduated	chool from		Year of high school graduation	
Name of college, university or career technol to attend beginning in Fall 2024	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 school year? □Freshman □Sophomore □Junior □	l	Will you have your first bachelor's degree before you begin the 2024-2025 school year? □ Yes □ No			

Step 2: Whose Income Should be Provided?

As of today, are you married? (Answer "Yes" if you are separated but not divorced.) At the beginning of the 2024-2025 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.)? 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 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 or ward of the court? Are you or were you an emancipated minor as determined by a court in Oklahoma? Are you or were you in legal guardianship as determined by a court in Oklahoma? At any time on or after July 1, 2023, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless? At any time on or after July 1, 2023, 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? At any time on or after July 1, 2023, did the director of a runaway or homeless youth basic center or transitional			
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	living program determine that you were an unaccompanied youth who was homeless or were self-supporting and	□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". Please combine and enter information for both parents if married and filing taxes separately.

What is your legal parents' marital status as of today? Mo		Month and year they we	ere married,
☐ Married/Remarried ☐ Divorced/Separated ☐ Never Married separated ☐ Separa		separated, divorced or	widowed
☐ Widowed ☐ Unmarried and both parents living to	ogether	Month Ye	ar
Parent 1 (Father/Mother/Stepparent) date of birth	Parent 2 (Father/M	Nother/Stepparent) date of b	irth
Month Day Year	Month Da	ay Year	
How many people are in your parents' household?	In which state do	your parents reside?	
(include yourself)		-	
How many people in your parents' household (include	de yourself) will be	college students between	n July 1, 2024
and June 30, 2025?	,	C	•
For 2022, have your parents completed their IRS income tax return? (circle one)			
☐ My parents have completed their return. ☐ My parents will file, but have not done so yet. ☐ My parents will			
not file a tax return.	ŕ	•	. 1
If your parents did or will file an IRS income tax retu	urn for 2022 , what	was	
your parents' Adjusted Gross Income (AGI)? (IRS Form 1040-line 11)			
y p	,	\$	
If your parents have income from work, even if you h	have included those		Parent 2
amounts in the adjusted gross income above, enter the income from work			\$
amounts for your parents.		Ψ	Ψ
umoums joi your parems.			

Enter the amount of income tax that your parents paid for 2022. Income	\$
tax amount is from IRS tax forms. (IRS Form 1040-line 22 minus Schedule 2-line 2)	

Other information about income and/or payments

Enter total amount received or paid in 2022. Please enter "0" for each category in which no income was received or no payments made. Please combine and enter information for both parents if married and filing taxes separately.

ining taxes separately.	
Tax exempt interest income.	\$
IRS Form 1040: line 2a	
Untaxed portions of IRA distributions or other pensions.	\$
IRS Form 1040: line 4a minus4b	
IRA rollover into another IRA or qualified plan.	\$
Untaxed portions of pensions.	\$
IRS Form 1040: line5a minus 5b	
Pension rollover into an IRA or other qualified plan.	\$
Did the parents' receive the earned income credit (EIC)? IRS Form 1040: line 27	
☐ Yes ☐ No ☐ Don't know	
Payments to tax deferred pension or savings plans or IRA deductions and payments to	
self-employed SEP, SIMPLE, Keogh and other qualified plans.	\$
IRS Form 1040 Schedule 1: total of lines 16 +20	
Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS	\$
form 1040-Schedule 3, line 3.	
Did the parents' file a Schedule A, B, D, E, F, or H with their 2022 IRS Form 1040?	
☐ Yes ☐ No ☐ Don't know	
Net profit or loss from IRS Form 1040 Schedule C	\$
IRS Form 1040 Schedule C: line 31	
Scholarship and Grant aid reported in the parents' adjusted gross income.	\$
Foreign earned income exclusion.	\$
IRS Form 1040 Schedule 1: line 8d	

Additional information

Annual Child Support Received	\$
Enter total amount the parents received in child support for the last complete calendar year. If the	
parent is married, enter the combined amount the parent and their spouse received.	
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)? Don't include the home the parent lives in. Net worth is the value of the	\$
investments minus any debts owed against them.	
As of today, what is the net worth of your parents' current businesses and/or investment	
farms?	
Enter the net worth of your parents' businesses or for-profit agricultural operations. Net worth is the	\$
value of the businesses or farms minus any debts owed against them	•

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". Please combine and enter information for both you and your spouse if married and filing taxes separately.

1 4		
For 2022, have you completed your IRS income tax return? (circle one)		
\Box I have completed my return. \Box I will file, but have not done so yet. \Box I w	ill not file a tax retu	arn.
If you did or will file an IRS income tax return for 2022, what was your		
Adjusted Gross Income (AGI)? (IRS Form 1040-line 11)		
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 2022. Income tax amoun		
forms. (IRS Form 1040-line 22 minus Schedule 2-line 2)	\$	

Other information about income and/or payments

Enter total amount received or paid in $\underline{2022}$. Please enter "0" for each category in which no income was received or no payments made. Please enter information for both you and your spouse if married and filing separately.

ming separatery.		
Tax exempt interest income.	\$	
IRS Form 1040: line 2a		
Untaxed portions of IRA distributions or other pensions.	\$	
IRS Form 1040: line 4a minus4b		
IRA rollover into another IRA or qualified plan.	\$	
Untaxed portions of pensions.	\$	
IRS Form 1040: line5a minus 5b		
Pension rollover into an IRA or other qualified plan.	\$	
Did the student receive the earned income credit (EIC)? IRS Form 1040: line 27		
☐ Yes ☐ No ☐ Don't know		
Payments to tax deferred pension or savings plans or IRA deductions and payments to		
self-employed SEP, SIMPLE, Keogh and other qualified plans.	\$	
IRS Form 1040 Schedule 1: total of lines 16 +20		
Education credits (American Opportunity, Hope and Lifetime Learning tax credits) from IRS	\$	
form 1040-Schedule 3, line 3.		
Did the student file a Schedule A, B, D, E, F, or H with their 2022 IRS Form 1040?		
☐ Yes ☐ No ☐ Don't know		
Net profit or loss from IRS Form 1040 Schedule C	\$	
IRS Form 1040 Schedule C: line 31		
Scholarship and Grant aid reported in your adjusted gross income.	\$	
Foreign earned income exclusion.	\$	
IRS Form 1040 Schedule 1: line 8d		

Additional information

Annual Child Support Received	\$
Enter total amount the student received in child support for the last complete calendar year. If the	
student is married, enter the combined amount the student and their spouse received.	
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)? Don't include the home the student lives in. Net worth is the value of the	\$
investments minus any debts owed against them.	
As of today, what is the net worth of your (and spouse's) current businesses and/or	
investment farms?	
Enter the net worth of the student's (and spouse's) businesses or for-profit agricultural operations.	\$
Net worth is the value of the businesses or farms minus any debts owed against them.	

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

V 1	
How many people are in your	household? (Include yourself)
How many people in your hou	sehold will be college students between July 1, 2024 and June 30, 2025?

Step 6: Signatures

The application will not be considered without the appropriate signatures.

The application will not be considered	a williout the appi	opriate 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