

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 <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 2024</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 2024-2025 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 2024-2025 school year?</i> <input type="checkbox"/> Yes <input type="checkbox"/> No

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)	\$
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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.

Tax exempt interest income. IRS Form 1040: line 2a	\$
Untaxed portions of IRA distributions or other pensions. IRS Form 1040: line 4a minus 4b	\$
IRA rollover into another IRA or qualified plan.	\$
Untaxed portions of pensions. IRS Form 1040: line 5a 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 <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 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.

For 2022, have you completed your IRS income tax return? (circle one) <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.		
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 in the adjusted gross income above, enter the income from work amounts for you or your spouse or both if both worked.	Student	Spouse
	\$	\$
Enter the amount of income tax that you 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 enter information for both you and your spouse if married and filing separately.

Tax exempt interest income. IRS Form 1040: line 2a	\$
Untaxed portions of IRA distributions or other pensions. IRS Form 1040: line 4a minus 4b	\$
IRA rollover into another IRA or qualified plan.	\$
Untaxed portions of pensions. IRS Form 1040: line 5a 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 <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 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

<i>Annual Child Support Received</i> 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.	\$
<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)? Don't include the home the student lives in. Net worth is the value of the investments minus any debts owed against them.</i>	\$
<i>As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms?</i> 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.

<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, 2024 and June 30, 2025?</i>

Step 6: Signatures

The application will not be considered 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