PIVOT FOUNDATION

FAFSA Checklist

How Do I know if I should Complete the FAFSA or TASFA

✅ Complete the FAFSA if you are a U.S. citizen or an eligible non-citizen (e.g., permanent resident). The FAFSA is the application for federal and state financial aid. **DO NOT COMPLETE BOTH THE FAFSA AND TASFA**.

✅ Complete the TASFA if you are a non-citizen who qualifies for in-state tuition under Texas law (e.g., DACA recipients and certain undocumented students). The TASFA is the application for state financial aid in Texas.

Before you Begin the FAFSA

⭕ Create an FSA ID

⭕ Student and Parent (if applicable): Visit FASA website to create your FSA ID, which is needed to sign your FAFSA electronically. Keep your FSA ID and password in a safe place.

What you Need for FAFSA

- **Personal Information:**
- Social Security Number: (Student and Parent)
- Driver's License Number (if you have one)
- Alien Registration Number (if you are not a U.S. citizen)
- **Tax Information:**
- Federal Tax Returns: For the relevant tax year (e.g., 2023 tax return for the 2025-2026 FAFSA)
  - Student: If you filed taxes.
  - Parent(s): If the student is dependent.
- W-2 Forms: For the relevant tax year (e.g., 2023).
- Records of Untaxed Income include child support, interest income, and veterans non-education benefits.
- Income Information: Any additional income earned, savings, investments, and other assets.
- **Financial Information:**
- Current Bank Statements: These are for checking, saving, and any other financial accounts.
- Investment Records: If applicable, such as stocks, bonds, and real estate (excluding the home in which you live).
- Business and Farm Records: If you own a business or farm.
- **Other Information:**
- List of Schools: You're interested in attending (up to 10 schools). They will receive your FAFSA information.
- Email Address: This is for both the student and parent (if applicable) for FAFSA communications.

Helpful Tips

- Gather Documents Early: Having all your documents ready will make the FAFSA process smoother.
- Use the IRS Data Retrieval Tool: This tool can automatically transfer your tax return information into the FAFSA, reducing errors and saving time.
- Submit FAFSA Early: The FAFSA opens on October 1st each year. The sooner you apply, the better your chances of receiving aid.

After Submission:
- Confirm Submission: You'll receive a confirmation email after submitting the FAFSA.
- Review Your Student Aid Report (SAR): This will be sent to you within a few days. Check for accuracy and make any necessary corrections.
- Follow Up with Schools: Ensure that each school you applied to has received your FAFSA and is processing your financial aid package.

For more resources and assistance, visit our website, www.pivotfdn.org, or contact your school's financial aid office.