

Tips for completing the Kellogg Application for Financial Aid, 2009-2010

Here are some helpful tips for completing the Kellogg Application for Financial Aid. Please read through the tips below and call or e-mail the Office of Financial Aid with any additional questions.

As you complete the 2009-2010 Kellogg Financial Aid Application, please do not leave any fields blank. For questions requiring dollar amounts, if your answer is \$0, please mark \$0. For questions that do not apply to you, mark "N/A." Leaving any portion blank will cause a delay in the processing of your financial aid application.

Section B1-3 Household Information

Household information is required to complete the Needs Analysis, and to determine whether we will need additional information from you.

(1) Provide information on your housing plan for the 2009-10 academic year.

(2) If you are engaged and will get married by 12/01//2009, please submit a copy of the 2008 Tax Return and W2(s) of your prospective spouse. If your spouse/prospective spouse will be enrolled as a student at least half-time, please state the name of the college/university.

(3) Please list all legal dependents that will be living with you while you attend Kellogg.

Section C 1 Financial Aid Eligibility and Federal Application Status

(1) If you are required to complete the 2009-2010 Free Application for Federal Student Aid (FAFSA) please state when you submitted your application to the federal processor. If you have not completed the FAFSA, please complete it right away; we need your FAFSA in order to process your financial aid application.

When completing your FAFSA, please be sure to use the following School Code:

Title IV School code (Financial Aid): 001739

**Section D 1-3 Student's and (Spouse's/Prospective Spouse's)
Anticipated Gross Income**

(1) Please provide your gross monthly earnings for the three months (June, July and August; usually from your Internship earnings) prior to the enrollment period. If you are not employed for the three months prior to the enrollment period, please provide us with a detailed explanation in Section I of the application.

(2) Provide the same information for your spouse/prospective spouse for the three months and for each month during the enrollment period (remaining 9 months).

(3) If you will receive other monthly income or benefits please state those amounts and explain in Section I of the application.

Section E 1-5 Student's (and Spouse's/Prospective Spouse's) Assets

(1) Please provide a record of all funds you expect to have at the start of the enrollment period (September 2009 for 2Y MBA/MMM Students). Please take into consideration summer expenses and expenditures for your local home and educational costs for school. Financial aid does not disburse to your student account until the first day of full-time classes.

(2-3) Provide the projected value of all financial resources. This includes and is not limited to stocks, bonds, certificates of deposits and trust funds etc.

(4) Provide the amount of all retirement funds.

(5) Please list any assets and investments that do not fit into any of the above categories in this section, and explain them in Section I.

Section F Outside Scholarship Assistance

If you have been awarded a scholarship from a source other than Kellogg, please provide the name of the issuing institution, the scholarship and the awarded amount.

Section G1-4 Other Anticipated Financial Resources

(1-2) If you are receiving financial assistance from your parents or relatives, please confirm the amount with them. This resource cannot be replaced with a loan.

(3) If you are receiving tuition reimbursement from your employer please state the amount for the academic year.

(4) If there are other resources you are receiving, please state the amount, source and explain in Section I.

Section H Tax Return Status

Students (and their spouse/prospective spouse) who are U.S. Citizens and Permanent Residents must submit a signed copy of their 2008 federal tax return, with all schedules and W2(s). Please state the status of your 2008 Tax Return in this section. If a tax return is not being filed, please report the income in this section.

International students (and their spouse/prospective spouse) should submit an income statement and/or letter from their employer stating their 2008 income and any taxes paid on their behalf. Please translate the amounts into U.S. currency based upon the rate at the time of your application. If a U.S. tax return was filed, please submit a signed copy to our office. (The 2008 tax information is only required for International Students who did not apply for financial aid in their first year at Kellogg, and we did not receive the 2007 income statement).

Section I. Explanations and Special Circumstances

Please use this section to explain in detail to us any of the information you have provided on this form. Please document any

information or circumstance you think our office should be aware of when considering your application for financial aid.

Please submit this form online via CAESAR.

Please log in with your NetID and password.

If you have additional questions please call 847.491.3308 or e-mail the Office of Financial Aid at finaid@kellogg.northwestern.edu.