

Northwestern | Kellogg

LOAN ASSISTANCE PROGRAM

I. Personal Information

Name: _____

Class: _____

Date of Birth: _____

Social Security Number(if applicable): _____

Home Address: _____

Phone: _____

II. Employment Information

Employer: _____

Employer's Address: _____

Employer's Phone: _____

Your Title: _____

Dates of Employment: _____

Your Email: _____

Your Fax Number: _____

III. Attachments

1. One to two page essay describing your background, involvement in the public/nonprofit/ngo sector, as well as career focus.
2. Personal income and asset statement.
3. Summary of Kellogg educational debt.
4. Federal income tax return.
5. Verification of employment and salary level for the applicant sent by the employer directly to the Kellogg School Office of Financial Aid.
6. Verification of employment and salary level for the applicant's spouse (if applicable) sent by the employer directly to the Kellogg School Office of Financial Aid.
7. Proof of employer's nonprofit status or comparable documentation for nongovernmental organizations.
8. Documentation (payment schedules) of need-based loans for both Kellogg School and non-Kellogg related loan obligations.

IV. Signature and Certification

I declare that the information in this application is correct and complete to the best of my knowledge. The Kellogg School may investigate the information I have provided.

APPLICANT'S SIGNATURE

DATE

INCOME AND ASSET STATEMENT

Name: _____

Class: _____

FILING STATUS _____ Single
 _____ Married

INCOME

1a Applicant's Annual Salary _____

1b Spouse's Salary _____

1c Other Income _____

2a Total Dividends _____

2b Total Interest _____

2c Other _____

 Please describe: _____

Total other income 2a + 2b + 2c _____

TOTAL INCOME 1a + 1b + 1c _____

ASSET INFORMATION

3a Cash, savings and checking accounts _____

3b Total value of all stocks, bonds, CDs and other investments _____

3c Total value of IRAs/Pension plans _____

3d Total value of trust funds _____

3e Total value of other assets (explain on back of page) _____

EDUCATION DEBT PRIOR TO ATTENDING KELLOGG (detail on page 3)

4a Applicant's annual payments _____

4b Spouse's annual payments _____

Total education debt prior to Kellogg 4a + 4b _____

EXEMPTIONS

Spouse 5a _____

Dependents:

Name Relationship

5b _____

5c _____

5d _____

TOTAL DEPENDENTS 5a + 5b + 5c + 5d _____

ALLOWANCE FOR EXEMPTIONS

Dependents x Exemption Allowance _____

KELLOGG DEBT

Principal _____

Current annual payments _____

EDUCATIONAL LOAN REPORT

Name: _____ Class: _____

APPLICANT'S EDUCATIONAL LOANS PRIOR TO KELLOGG						
Lender	Amount of Loan	Interest Rate	Current Balance	Monthly Payment	Payment Start Date	Status Current?
1.						
2.						
3.						
4.						
5.						
6.						

SPOUSE'S EDUCATIONAL LOANS						
Lender	Amount of Loan	Interest Rate	Current Balance	Monthly Payment	Payment Start Date	Status Current?
1.						
2.						
3.						
4.						
5.						
6.						

APPLICANT'S KELLOGG LOANS *						
Lender	Amount of Loan	Interest Rate	Current Balance	Monthly Payment	Payment Start Date	Status Current?
1.						
2.						
3.						
4.						
5.						
6.						

* Please attach documentation of loan repayment (i.e. coupon stub, monthly statement, loan repayment schedule).

**KELLOGG SCHOOL OF MANAGEMENT
LOAN ASSISTANCE PROGRAM
REQUEST FOR VERIFICATION OF EMPLOYMENT**

Instructions:

Applicant: Complete Part I. Forward directly to employer.

Employer: Read Part I. Complete Part II. Sign and return to the Kellogg School of Management.

Part I—Request

To: (Name and Address of Employer)

From:

Loan Assistance
Office of Financial Aid
Kellogg School of Management
2211 Campus Drive,
Evanston, IL 60208-2001

I have applied to Kellogg's Loan Assistance Program and stated that you now employ me. My signature below authorizes you to verify my employment information to Kellogg.

Name and address of applicant:

Signature of applicant

Date

Part II—Verification of Present Employment

Applicant's date of employment: _____

Present position/title: _____

Probability of continued employment: _____

Enter current base salary and check pay period: _____

Annual: _____ Monthly: _____ Weekly: _____ Hourly: _____ Other: _____

Remarks: (If paid hourly, please indicate the average number of hours worked per week. If a bonus or overtime is applicable, please indicate.)

Name of employer (please print)

Title

Signature of employer

Date

**KELLOGG SCHOOL OF MANAGEMENT
LOAN ASSISTANCE PROGRAM
REQUEST FOR SPOUSE'S VERIFICATION OF EMPLOYMENT**

Instructions:

Applicant's Spouse: Complete Part I. Forward directly to employer.

Employer: Read Part I. Complete Part II. Sign and return to the Kellogg School of Management.

Part I—Request

To: (Name and Address of Employer)

From:

Loan Assistance
Office of Financial Aid
Kellogg School of Management
2211 Campus Drive, Room #236
Evanston, IL 60208-2001

My spouse has applied to Kellogg's Loan Assistance Program and stated that you now employ me. My signature below authorizes you to verify my employment information to Kellogg.

Name and address of applicant's spouse:

Name of applicant

Signature of spouse

Date

Part II—Verification of Present Employment

Applicant's spouse's date of employment: _____

Present position/title: _____

Probability of continued employment: _____

Enter current base salary and check pay period: _____

Annual: _____ Monthly: _____ Weekly: _____ Hourly: _____ Other: _____

Remarks: (If paid hourly, please indicate the average number of hours worked per week. If a bonus or overtime is applicable, please indicate.)

Name of employer (please print)

Title

Signature of employer

Date