

CURTIS INSTITUTE OF MUSIC
Office of Student Financial Assistance
1726 Locust Street, Philadelphia, PA 19103

APPLICATION FOR SUPPLEMENTAL FINANCIAL ASSISTANCE
2018-19 CHECKLISTS

NOTE: This checklist is intended for your personal use. Please *do not* return this sheet to the Office of Student Financial Assistance.

ALL APPLICANTS FOR SUPPLEMENTAL FINANCIAL ASSISTANCE:

_____ I have completed the Curtis Institute of Music 2018-19 Application for Supplemental Financial Assistance and have submitted it to the Office of Student Financial Assistance.

IF YOU ARE A U.S. CITIZEN OR A PERMANENT RESIDENT OF THE U.S.:

_____ I have completed the 2018-19 Free Application for Federal Student Aid (FAFSA) and have submitted it to the U. S. Department of Education. (Cannot be filed until after January 1, 2018)

_____ I have submitted signed copies of year 2017 IRS income tax returns OR notarized statements that tax returns have not and will not be filed for both my parent(s) and myself , or

_____ Year 2017 tax returns are not yet available. I have submitted instead copies of year 2016 income tax returns and wages-earned statements from employers for January-December, 2017 for both my parent(s) and myself. I understand that year 2017 tax returns must be submitted once they become available. (This may delay a decision on your aid package.)

_____ If I completed the FAFSA using estimated income; I have verified my tax information with my FAFSA by using the IRS data retrieval tool.

IF YOU ARE AN INTERNATIONAL STUDENT:

_____ I have submitted signed copies of tax returns for the most recent tax year available for both my parent(s) and me.

_____ I have submitted wages-earned statements for my parent(s) from employers for January-December 2017.

_____ I have submitted all bank and financial statements for accounts and investments held by both my parent(s) and me. This includes any bank accounts, investments, real estate, business assets, partnerships, corporations or other assets.

_____ I have a sponsor and have submitted a letter from the sponsor stating the total estimated support to be provided for the 2018-19 school year.

FILING DEADLINES

New Students: MARCH 1, 2018

Returning Students: MAY 1, 2018

QUESTIONS?

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CURTIS INSTITUTE OF MUSIC

APPLICATION FOR SUPPLEMENTAL FINANCIAL ASSISTANCE **2018-19 INSTRUCTION SHEET – NEW STUDENTS**

Supplemental financial assistance is awarded at Curtis on the basis of financial need for living expenses. Before turning to Curtis for supplemental aid, students are expected to seek assistance from non-Curtis sources, including grants, loans, and scholarships available through private, public and other sources.

Deadline for applications and supporting documents: March 1, 2018.

- You may use estimated income when completing application forms. Income verification is required and that adjustments will be made as needed.
- Financial assistance applications and supporting documents are kept in the Office of Student Financial Assistance. Awards are considered once the applicant has been accepted for enrollment and all required documents are received.

FILING REQUIREMENTS: *Please do not fax or send documents as an attachment to an email. Please send via U.S. mail or other mail service.*

U.S. Citizens and U.S. Permanent Residents:

1. 2018-19 Curtis Application for Supplemental Financial Assistance
2. 2018-19 Free Application for Federal Student Aid (FAFSA)
3. Signed tax returns – see below
4. Sponsor letter of support, if you have a financial sponsor

International Students:

1. 2018-19 Curtis' Application for Supplemental Financial Assistance
2. Financial documents – see below
3. Sponsor letter of support, if you have a financial sponsor

FILING INSTRUCTIONS

All Applicants: Complete and submit the 2018-19 Curtis Application for Supplemental Financial Assistance to: Curtis Institute of Music, Office of Student Financial Assistance, 1726 Locust St., Philadelphia, PA 19103.

U.S. Citizens and U.S. Permanent Residents

Complete and file a 2018-19 Free Application for Federal Student Aid (FAFSA). NOTE: The FAFSA should not be completed prior to January 1, 2018.

FAFSA on the Web

Step 1: Before you begin the application, make sure you have a PIN.

- You must have a PIN to electronically sign the FAFSA. If you don't already have one, apply at <http://www.pin.ed.gov>.
- If you're a dependent student, your parents should also apply for a PIN so that they can electronically sign your FAFSA.
- Your PIN will be emailed to you within 1 to 5 days

Step 2: Complete and submit the FAFSA application online.

- The FAFSA home page is <http://www.fafsa.ed.gov>. Section 1 on the home page has a list of documents you will need to complete the FAFSA.
- The FAFSA Title IV School Code for Curtis is **003251**.
- Carefully review your answers before submitting the information.
- If you need help with the application, contact the Federal Student Aid Information Center at 1-800-433-3243.
- At Curtis, only Opera students are considered to be graduate level students. All other students are continuing undergraduates and must provide parental information. Follow the instructions on the FAFSA.

After the FAFSA has been processed:

- If you provided an email address, you'll receive a link to your online Student Aid Report (SAR) within 5 days. Otherwise you'll receive a paper SAR in the mail in about two weeks. If you don't hear anything within two weeks, return to <http://www.fafsa.ed.gov> and select "Check the Status of a Submitted FAFSA."
- Review all SAR information to make sure the answers are correct. If you used estimated figures on the FAFSA, compare your answers to completed tax returns or other financial records when available.
- Make corrections or changes as needed. With your PIN, you can return any time to <http://www.fafsa.ed.gov> to review, print, or correct your application information.
- Curtis receives the information electronically from the processor.

Submit copies of year 2017 IRS income tax returns for both you and your parents.

- Send copies of the federal tax return, only schedules A and B, and all W-2 statements. **Do not send state returns.** *Additional tax schedules should only be sent if requested by Curtis at a later date.*
- If your parents are divorced or separated or file separate returns, signed copies of both tax returns are required.
- If you and/or your parents did not and will not file a 2016 tax return, submit signed, dated and **notarized** statement(s) to this effect.
- If it is impossible to complete and submit 2017 tax returns by the March 1, 2018 deadline, send copies of 2016 income tax returns and copies of W-2, 1099, and/or other wages-earned statements from employers for January-December 2017. Send signed copies of the 2017 tax return once it is available.
- **All graduate (opera) applicants are required to submit tax documents for parents.**

Applications selected for verification by the U.S. Department of Education

- You and your parent(s) must have the reported income verified directly with the IRS. Since most families file the FAFSA before they complete their tax return, you are required to have the FAFSA information verified with the IRS after your tax return is filed. You can do this by using the IRS data retrieval tool built into the FAFSA application.
- If you cannot use the IRS Data Retrieval tool you must submit a "Federal Tax Transcript" by calling the IRS at 1-800-908-9946 or visit www.IRS.GOV and click on the "Order a Return make sure it is the IRS Tax Return Transcript that you request.

International Applicants: Required Financial Information

- Submit tax forms from your country for the most recent tax year available for both you and your parents. If your parents are divorced or separated or file separate returns, signed copies of both tax returns must be submitted.
- Submit official letters from employers for both you and your parents stating total wages earned from January through December, 2017.
- Submit the most recent bank statements for all accounts held by you and your parents.
- Submit financial statements for all investments held by you and your parents.
- Include trust funds, money market funds, certificates of deposit, stocks, bonds, and any other holdings.
- Include information on all real estate, business assets, partnerships, corporations or other assets.

Important information for international applicants: All documents must be translated into English and all income figures must be in U.S. dollars. Send all documents to the Curtis Office of Student Financial Assistance.

Please do not fax or send documents as an attachment to an email. Please send via U.S. mail or other mail service.

If you have questions, contact.....

Veronica McAuley
Phone: 215-717-3188
Email: veronica.mcauley@curtis.edu

2018–19 APPLICATION FOR SUPPLEMENTAL FINANCIAL ASSISTANCE: NEW STUDENTS

DEMOGRAPHIC INFORMATION

1. Name _____
LAST FIRST MIDDLE

2. Current Address _____
NUMBER AND STREET CITY

STATE ZIP CODE COUNTRY TELEPHONE: AREA CODE AND NUMBER E-MAIL

3. Permanent Address _____
(If different from # 2) NUMBER AND STREET CITY STATE ZIP CODE COUNTRY

4. Date of Birth _____ 5. U.S. Social Security Number _____
MONTH DAY YEAR

6. Gender: Male Female As of today, are you married? Yes No

- If you will be 22 years old or older as of September 1, 2018 indicate your living preference:

On-campus "Lenfest Hall" _____ Off-campus apartment _____ Resources towards apartment \$ _____

7. Citizenship Status: United States
 International: _____
COUNTRY VISA STATUS

PERMANENT RESIDENT: NUMBER

8. Will you have earned a high school diploma or passed the GED exam by September 2017?

Yes: _____ No

GRADUATION DATE

Do you have a Bachelor's Degree _____ Date Received _____?

9. Instrument/Major Study Area: _____

10. Program you are applying for:

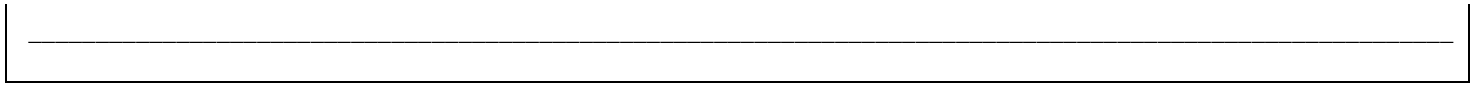
- Bachelor of Music
- Diploma (includes post- bachelor students NOT in opera program)
- Precollege Program (*I will be concurrently enrolled in high school, middle school, or grammar school.*)
- Master of Music (Opera only)
- Professional Studies in Opera

For Students 17 and UNDER without a High School Diploma

A parent or guardian must live with you for the entire academic year. Please provide the following information:

Who will be living with you? _____
NAME RELATIONSHIP

Please explain what resources this person will have to support themselves while you are at Curtis. \$ _____ per year



STUDENT INFORMATION

11. List all **post-secondary** (after high school) institutions you have attended. (Attach an additional sheet if necessary.)

If none, skip to question 13.

<u>NAME OF SCHOOL</u>	<u>LOCATION</u>	<u>DATES</u>	<u>DID YOU RECEIVE FINANCIAL ASSISTANCE?</u>
1) _____	_____	_____	_____
2) _____	_____	_____	_____

12. What is your current outstanding student loan balance from the following sources?

\$ _____ Federal student loans (include FFELP and Direct Loans)

\$ _____ Non-Federal student loans

13. Did you file, or will you file, a 2017 U.S. Federal Income Tax Return or, for international students, a 2017 tax form in your country of residence? Please forward a signed copy of the tax return with this application or as soon as completed.

___ Yes ___ No

14. Please list the current value of your assets as of the date this application is filed.

\$ _____ Cash, savings, and checking accounts

\$ _____ Stocks, bonds, and certificates of deposits

\$ _____ Mutual funds and/or other investments

\$ _____ Trust funds (even if not redeemable this year)—enter the total value of fund

15. Please indicate any prizes/scholarships/awards received in the past twelve months. Include the dollar value of the award. Will these be renewed for 2018-19? _____

16. List **estimated personal resources** you will have towards payment of your living expenses for the **2018–19 school year**. (Do not include work-study earnings.)

\$ _____ Parent and family contribution

\$ _____ Student savings and investments

\$ _____ Estimated summer 2018 earnings

\$ _____ Sponsor contribution

\$ _____ Off-campus/regular employment during academic year (estimated)

\$ _____ Off-campus/gigs and other one-time performances during academic year (estimated)

\$ _____ Awards and/or outside scholarships: _____

\$ _____ Veteran Benefits – Please specify Chapter: _____

\$ _____ Other: _____

\$ _____ **Total 2018–19 estimated personal resources**

17. Explain any special circumstances you wish the Curtis Financial Assistance Committee to consider when reviewing your application. (Attach a separate sheet if necessary.)

PARENT INFORMATION (Required of all applicants for financial assistance)

18. Parents' Marital Status: Married Divorced Separated
 Mother living, father deceased Father living, mother deceased
 Other: _____

19. Check one: Father Stepfather Male guardian Sponsor

 NAME AGE OCCUPATION

 EMPLOYER JOB TITLE

20. Check one: Mother Stepmother Female guardian Sponsor

 NAME AGE OCCUPATION

 EMPLOYER JOB TITLE

21. Give the following information for those who are financially dependent on your parents or guardian, such as a brother, sister, or grandparent. (Attach additional sheet if necessary.) Do not include yourself.

<u>NAME</u>	<u>RELATIONSHIP</u>	<u>AGE</u>	<u>2017-18 EDUCATIONAL INSTITUTION</u>
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- 1) _____
- 2) _____
- 3) _____
- 4) _____

22. Did your parents file, or will your parents file, a 2017 U.S. Federal Income Tax Return or, for international students, a 2017 tax form in your country of residence? Please forward a signed copy of the tax return with this application or as soon as completed.

Yes No

23. Please list the current value of your parents' assets as of the date this application is filed.

- \$ _____ Cash, savings, and checking accounts
- \$ _____ Stocks, bonds, and certificates of deposits
- \$ _____ Mutual funds and/or other investments
- \$ _____ Net value of parent's primary residence (current market value minus any outstanding mortgages)
- \$ _____ Net value of all other properties (land, rental properties, second homes, etc.)

Please explain: _____

\$ _____ Net value of business, if owned by family (assets minus liabilities from most recent balance sheet)
Please attach supporting documentation, including a copy of the balance sheet and tax return.

24. Will your current health insurance policy continue to provide coverage for the student in 2018-19?

Yes No

REQUIRED CERTIFICATIONS

All U.S. Citizens and Permanent Residents ARE REQUIRED TO READ AND INITIAL THE FOLLOWING STATEMENTS.

I affirm that I will use any funds awarded under Title IV programs (Pell grants, all federal loans) solely for educational expenses while I am enrolled at the Curtis Institute of Music.

YOUR INITIALS

I certify that I do not owe a refund and/or that I am not in default on any Pell grant, Supplemental Educational Opportunity Grant (SEOG), Perkins Loan (formerly NDSL), Stafford Loan (formerly GSL), or on any other loan awarded through the Federal Family Education Loan (FFEL) program or the William D. Ford Direct Loan Program.

YOUR INITIALS

I understand that I am responsible for repayment of any funds I receive which cannot reasonably be attributed to meeting my educational expenses while I am enrolled at the Curtis Institute of Music. I further understand that the amount of any repayment is based on regulations published by the U.S. Department of Education.

YOUR INITIALS

International applicants only, COMPLETE THE FOLLOWING QUESTIONS.

Does your government currently impose restrictions on the release, exchange, or amount of funds you may bring with you for study in the U.S.?

____ Yes: maximum amount per year _____

____ No

Will you have a source for emergency funds while you are a student at Curtis?

____ Yes: Who is the source, and what is your relationship? _____

____ No

Do you have permission to work legally in the U.S.?

____ Yes

____ No: Explain _____

All applicants: BY SIGNING BELOW, YOU AGREE TO THE FOLLOWING STATEMENTS:

The information included on this application is true and complete to the best of my knowledge. I agree to inform the Office of Student Financial Assistance of any changes that may affect the information on this application, including any proceeds I receive from work, performances, scholarships, awards, and/or competitions.

I understand that my completed Application for Supplemental Financial Assistance will not be considered until I have submitted all required supporting documents as indicated on the instruction sheet and have been accepted for enrollment at the Curtis Institute of Music.

STUDENT SIGNATURE DATE

SPOUSE SIGNATURE (IF APPLICABLE) DATE

PARENT/GUARDIAN SIGNATURE DATE
(REQUIRED OF ALL DEPENDANT STUDENTS)