

2018-2019 Loan-Only Application Form

You should complete this form if you are applying ONLY for student or parent loans and not receiving Yale Scholarship.

Federal Direct Loan Federal Direct Parent PLUS Private Student Loan

Section 1: Student Information

Name: _____ Yale I.D. Number: _____
 Birth Date: _____ E-mail Address: _____

Please complete Section II if you will be applying for a Federal Direct Loan. Otherwise, please skip to Section III or IV.

Section II: Federal Direct Loan

To be eligible, you must first complete the Free Application for Federal Student Aid (FAFSA) at fafsa.ed.gov. Once your loan has been processed, we will send you instructions for completing the online master promissory note (MPN). New borrowers also will receive instructions for completing the online entrance interview that is required.

| Grade Level | Base Amount (Limit of Subsidized Loan Eligibility) | Additional Unsubsidized Loan Amounts for All Undergraduate Students | Total Maximum Loan Amount |
|---------------|--|--|---------------------------------|
| First-year | \$3,500 | \$2,000 | \$5,500 |
| Sophomore | \$4,500 | \$2,000 | \$6,500 |
| Junior/Senior | \$5,500 | \$2,000 | \$7,500 |

Please note: Dependent students whose parents were denied a Parent Loan for Undergraduate Students (PLUS) and also independent students are eligible for the following additional unsubsidized loan amounts: \$4,000 for first-years and sophomores, and \$5,000 for juniors and seniors.

- Process my loan for the maximum amount that my grade level allows
- I would like to borrow an amount other than the maximum. Process my loan for \$ _____
- If I am not eligible for subsidized loan funds, I do **not** authorize Yale University to award me **unsubsidized** loan funds (for which I must either pay interest while in school or capitalize at repayment).

Section II Continued: Federal Direct Loan

Household and Educational Information

List below **all members of your household**. Include your parent(s) and anyone else for whom your parent(s) will provide more than one-half support between July 1, 2018 and June 30, 2019. (If your parents are separated or divorced, provide information here for your **custodial parent's household only**.)

| Name | Age | Relationship to Student |
|--------------|-----|-------------------------|
| Yale Student | | |
| | | |
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| | | |
| | | |
| | | |
| | | |

Will any of the above family members (besides you or your parents) attend college in the 2018-2019 academic year? If yes, provide the following information for each family member who will attend college.

| Name of Family Member | Name of College | Grade Level in 2018-2019 | Enrollment Status | Housing Status |
|-----------------------|-----------------|--------------------------|-------------------|----------------|
| | | | | |
| | | | | |
| | | | | |

Tax Filing and Income Information

You may be required to submit the FAFSA IRS Data Retrieval Tool for you and your parents. If either you or your parents are not required to file a tax return, then you may be required to submit the appropriate 2018-2019 Tax Non-Filing Statement found on the Financial Aid website at finaid.yale.edu/forms.

Untaxed Income

Complete this table by indicating the amount received for each category of untaxed income in 2016. **Do not leave blanks; if your answer is zero, write "0."**

| | Student | Parents |
|--|---------|---------|
| Child support received (for all children) | \$ | \$ |
| Nontaxable Social Security/welfare benefits | \$ | \$ |
| Payments to tax-deferred pension and savings plans | \$ | \$ |
| Housing or living allowance | \$ | \$ |
| Other untaxed income (indicate source: _____) | \$ | \$ |

Section III: Supplement to Federal PLUS Loan

If you and your parent will **not** be applying for a Federal PLUS Loan, please skip to **Section IV**.

To be eligible, you must first complete the Free Application for Federal Student Aid (FAFSA) at fafsa.ed.gov. Once the loan has been processed, we will send the borrower instructions for completing the online master promissory note (MPN).

Parent Borrower Citizenship Status

Parent Borrower's Citizenship Status U.S. Citizen Eligible Noncitizen**

**If you are an eligible noncitizen, you must attach a photocopy of your Alien Registration Card for verification. If you do not have an Alien Registration Card, you must submit a copy of the documents that verify your eligible noncitizen status.

Parent Borrower Information

Name: _____ Social Security Number: _____
Home Telephone #: _____ Date of Birth: _____
Permanent Address: _____ E-mail Address: _____
_____ Driver's License State & #: _____

PLUS Loan Amount and Loan Period

Requested Loan Amount: \$ _____ Term(s) for which you are applying: _____

Please note that by signing this form, you are authorizing the U.S. Department of Education (USDE) to investigate your credit record. The PLUS loan will show as an anticipated credit on the student's billing account when the loan is pre-approved by USDE and the master promissory note (MPN) has been e-signed. Instructions for e-signing your MPN will be sent to you once your credit has been approved.

Please check one box only:

- If denied a PLUS loan, I request an additional Federal Direct Unsubsidized Loan for my son/daughter \$(4,000 for first-years and sophomores, and \$5,000 for juniors and seniors).
- If denied, I plan to appeal or obtain a credit-worthy endorser.

Section IV: Supplement to Alternative Loan Application

Complete the section below if you will or have already applied for an alternative educational loan through a private lender. If you will not be borrowing an alternative loan, skip to **Section V**.

[Click here for information about Student Loans](#). After you select a lender, record your choice below.

Lender Name _____ Amount: \$ _____

You must apply for an alternative loan directly with your lender. The loan will show as an anticipated credit on the student's billing account when the lender approves the loan, the borrower has completed the application process, and the school receives and processes the certification request from the lender.

Section V: Outside Aid Notification

The maximum amount for which we can certify a loan is the cost of attendance less any financial aid, including outside resources. List all sources of outside grants, scholarships, and loans that you expect to receive in 2018-2019. If the information about your outside scholarship changes after completing this application, you should promptly notify Undergraduate Financial Aid.

| | | | | Expected Payment Information | |
|---------------------|--------|----------------|---------------------|------------------------------|---------------------------------|
| Name of Scholarship | Source | Amount 2018-19 | Renewable? (Yes/No) | Number of Payments | Payment sent to? (Yale/student) |
| | | \$ | | | |
| | | \$ | | | |
| | | \$ | | | |
| | | \$ | | | |

Section VI: Buckley Amendment

Yes No I, the student, authorize Yale University to provide any information relating to my financial aid, or lack thereof, to my parent(s) or guardian(s).

Section VIII: Certification Statement

- I certify that I will use any money I receive under a Title IV HEA loan, grant, work-study or scholarship program only for expenses related to my study at Yale.
- I certify that I do not owe a refund on any grant, am not in default on any loan, and have not borrowed in excess of the academic year or aggregate loan limits under the Title IV programs at any institution. I understand that it is Yale College policy to refuse financial aid to any student who is in default on any federal or university loan, who has borrowed in excess of loan limits, or who owes a refund to the U.S. Department of Education, Yale, or any other institution. Further, I understand that if a student is found to be in default, to have borrowed in excess of the loan limits, or to owe a refund after being offered financial aid, the University will withdraw all aid immediately while continuing to hold the student responsible for any charges incurred. Students who falsely attest to their status in this regard may be subject to disciplinary action as well.
- I understand that the student applicant may be given access to all information filed in support of this application for financial aid. I understand that it is the policy of Yale College to provide the following information to any donor or agency in support of the applicant's receipt of a scholarship: academic transcript, enrollment status, financial need and award, and information about the applicant's activities and interest in high school and at Yale. I further understand that all award notices are sent to the student.

Student Signature: _____ Date: _____

Parent Signature: _____ Date: _____