



# Ready to File the FAFSA?

## Here's What You'll Need

Filing for financial aid is less stressful when you are prepared. Use the checklists below to help you fill out the **2027-28** Free Application for Federal Student Aid (FAFSA).\*

### TIPS

#### StudentAid.gov Account Setup

Visit [www.studentaid.gov](http://www.studentaid.gov) and setup an account. You will use this username and password to confirm your identity when signing the FAFSA. Dependent students will also need parent(s) to sign with a separate studentaid.gov account. You **MUST** have your StudentAid.gov accounts setup 3 days prior to filing the FAFSA.

When creating a StudentAid.gov account you must have access to your phone and email. During setup you will be asked to verify your cell phone and email address by entering a code sent to the contact information listed. Learn more at [www.ICANSucceed.org/studentaidaccount](http://www.ICANSucceed.org/studentaidaccount).

#### When should I file?

The 2027-28 FAFSA form will be available beginning October 1. Each college has a priority date for the FAFSA. You should file the FAFSA before the priority date. If you are applying to multiple schools, file by the earliest date.

#### Direct Data Exchange

The IRS Direct Data Exchange within the FAFSA application can be used to automatically pull MOST of your 2025 tax information into your FAFSA application. You will still need to have copies of your 2025 taxes and W-2s on hand.

#### Questions?

Call (877) 272-4692 or email [ICAN@ICANSucceed.org](mailto:ICAN@ICANSucceed.org). If you would like FAFSA completion assistance from an ICAN Student Success Advisor.

#### Student:

- A StudentAid.gov Account (see Tips at left)
- 2025 federal and state tax returns and W2s
- Child support received in the past year
- Asset information including:
  - Current value of Cash, Savings and Checking
  - Net worth of investments
  - Net worth of any business/farm
  - See back side for detailed information
- List of Federal Benefits received including:
  - Earned Income Tax Credit (EITC)
  - Federal Housing Assistance
  - Free or Reduced-Priced Lunch
  - Medicaid
  - QHP, SNAP, SSI, TANF, WIC
- State of legal residence, when you became a resident or birth month/year
- A list of the colleges/universities you wish to send the FAFSA
- Parent legal name, social security number, date of birth and email

#### Parent(s):

- A StudentAid.gov Account (see Tips at left)
- 2025 federal and state tax returns and W2s
- Child support received in the past year
- Asset information\*\*\* including:
  - Current value of Cash, Savings and Checking
  - Net worth of investments
  - Net worth of any business/farm
  - See back side for detailed information
- List of Federal Benefits received including:
  - Earned Income Tax Credit (EITC)
  - Federal Housing Assistance
  - Free or Reduced-Priced Lunch
  - Medicaid
  - QHP, SNAP, SSI, TANF, WIC
- State of legal residence, when you became a resident or birth month/year

# FAFSA Filing Tips & Helpful Hints

## Are You Independent?

- Were you born prior to the year 2004?
- As of today, are you married? (Answer "Yes" if you are separated but not divorced)
- At the beginning of the 2027-28 school year, will you be working on a graduate program?
- Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training or are you a veteran of the U.S. Armed Forces?
- Do you have children or dependents who live with you that will receive more than half of their support from you now and between July 1, 2027 and June 30, 2028?
- At any time since you turned 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?
- As determined by a court in your state of legal residence, are you or were you an emancipated minor or in a legal guardianship?
- At any time on or after July 1, 2026, were you homeless or at risk of being homeless?

## Who is Considered a Parent on the FAFSA?

- If your parent was never married and does not live with your other legal parent, or if your parent is widowed or not remarried, answer the questions about that parent.
- If your legal parents (biological, adoptive, or as determined by the state) are not married to each other and live together, select "Unmarried and both parents living together" and provide information about both of them regardless of their gender. Do not include any person who is not married to your parent and who is not a legal or biological parent.
- If your parents are divorced or separated, answer the questions about the parent who provides the most financial support. If this parent is remarried as of today, answer the questions about that parent and your stepparent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your stepparent.

\* Please refer to the 2026-27 FAFSA guide for a more detailed explanation. After Oct. 1, 2026, visit <https://fafsa.gov/options.htm> and click the link to 2027-2028 School Year.

## Investments Include:

- Cash, Savings and Checking (2nd Question Under Assets Section)

Following items should be combined for the 3rd Question Under Assets Section

- Real Estate (not the home you live in)
  - Trust funds
  - UGMA/UTMA accounts (student asset)
  - Money Market Funds
  - Mutual Funds
  - Certificates of Deposit
  - Stocks
  - Stock Options
  - Bonds
  - Other Securities
  - Installment & Land Sales
  - Commodities
  - Educational Savings Accounts including 529 plans, Coverdell and Educational IRAs. (List as parent asset if owned by the parent. If owned by someone other than the parent, it is not listed as an asset on the FAFSA.)
- ## Do Not Include:
- The home you live in
  - Life Insurance Values
  - Retirement Accounts
  - Pension Funds
  - Annuities
  - ROTH IRAs
  - Keogh Plans
  - UTMA/UGMA accounts for which you are a custodian, but not the owner.