

### DO NOT EMAIL OR FAX THIS FORM.

Please read all instructions before continuing on to the application.

**You must complete all sections of this application; do not leave any questions blank.** Forms submitted with blanks will be returned and this will delay your financial aid.

**Estimate what your family earned using last year's taxes.** Some families do not file their taxes until after March 2<sup>nd</sup>; **do not wait to submit this application.** We will correct your application when we receive your supporting documents. It is normal that your estimate may be different than the numbers on your tax forms.

**You must use the 12 month period of 2012 for all financial information.** The period is January 1<sup>st</sup> 2012 to December 31<sup>st</sup> 2012. If you filed taxes in another country, you may need to combine two tax periods into one 12 month period. You may follow instructions downloaded from the Soka website on how to do this.

**You must complete the following four steps in order.** Once you have completed each step, you will be emailed to notify you that the step has been completed the email will instruct you on how to begin the next step.

#### STEP 1: Complete the Financial Aid Application

You must complete the financial aid application and turn it in by the deadline. The deadline may be before you have all the exact information you need to complete the form. **You must estimate answers as best you can based on last year's tax information.**

#### STEP 2: Complete a Verification Form and Submit All Supporting Documentation

All international students must submit a verification form and supporting documents based on an email we will send you after processing your application. If the information you submit as part of this application differs from the information you submit as part of your supporting documentation, the Office of Financial Aid will correct this application for you with the updated information from your supporting documentation.

#### STEP 3: Accept or Decline the Loans Awarded to you

You must log on to your Soka Learn Account and choose the Financial Aid tab. You will see the area to accept or decline the loans. If you would like to accept only part of a loan, you may do so by emailing [financialaid@soka.edu](mailto:financialaid@soka.edu) with the new loan amount.

#### STEP 4: Complete the Student and/or Parent Loan Application

A student and/or parent loan application(s) will be sent to you via email. If you choose to take a loan, you must fill out and return the loan application. If you have already filled out this electronic form because you had a loan in 2012-2013, you do not need to do this process again.

Mail Applications to: **Soka University of America**  
**The Office of Financial Aid**  
**1 University Drive**  
**Aliso Viejo, CA 92656 – USA**

**Table 1**

| <i>Country</i>     | <i>Currency</i> | <i>\$1.00 =</i> |
|--------------------|-----------------|-----------------|
| Argentina          | Peso            | 4.72            |
| Australia          | Dollar          | 0.97            |
| Austria            | Euro            | 0.77            |
| Bolivia            | Boliviano       | 7.03            |
| Brasil             | Real            | 2.03            |
| Canada             | Dollar          | 0.99            |
| Chile              | Peso            | 475.57          |
| China              | Yuan Renminbi   | 6.31            |
| Colombia           | Peso            | 1804.10         |
| Dominican Republic | Peso            | 39.28           |
| France             | Euro            | 0.77            |
| Germany            | Euro            | 0.77            |
| Guatemala          | Quetzal         | 7.00            |
| Honduras           | Lempira         | 19.76           |
| Hong Kong          | Dollar          | 7.75            |
| India              | Rupee           | 52.95           |
| Indonesia          | Rupiah          | 9593.07         |
| Israel             | New Shekel      | 3.89            |
| Italy              | Euro            | 0.77            |
| Japan              | Yen             | 78.92           |
| Kenya              | Shilling        | 85.14           |
| Malaysia           | Ringgit         | 3.06            |
| Mexico             | Peso            | 12.89           |
| Nicaragua          | Cordoba Oro     | 23.98           |
| N. Korea           | Won             | 135.00          |
| Peru               | Nuevo Sol       | 2.59            |
| Philippine         | Peso            | 41.41           |
| Portugal           | Euro            | 0.77            |
| Russian Fd         | Ruble           | 31.11           |
| Singapore          | Dollar          | 1.22            |
| S. Korea           | Won             | 1106.89         |
| Switzerland        | Franc           | 0.94            |
| Taiwan             | Dollar          | 29.26           |
| Thailand           | Baht            | 30.70           |
| UK                 | Pound           | 0.62            |
| Venezuela          | Bolivar         | 4.30            |
| Viet Nam           | Dong            | 20876.38        |

**If your currency is not listed, please contact the Office of Financial Aid.**

|                     |            |            |               |
|---------------------|------------|------------|---------------|
| Student's Last Name | First Name | Student ID | Date of Birth |
|---------------------|------------|------------|---------------|

**Student Citizenship Status** (check one of the boxes below) If you check boxes 1,2, or 3, please contact the Office of Financial Aid before continuing with this application.

- 1 I am a US Citizen and I am also a citizen of: \_\_\_\_\_
- 2 I am a permanent resident of the United States of America
- 3 I am a green card holder
- 4 I am not a US citizen, my country of citizenship is \_\_\_\_\_ (and) \_\_\_\_\_

**Student Marital Status** (Check only one of the following)

Single                     
  Married                     
  Separated                     
  Divorced or Widowed

**Student Financial Information**

Did you work and earn money during the year 2012?

Yes                      No

Did you file, or will you file, taxes for the 2012 tax year?

Yes                      No

If yes, did you file your taxes in:

The USA                      My home country: \_\_\_\_\_

**HOW TO CALCULATE YOUR TAX YEAR** Your answers below should represent the 12 month period of 2012. If you filed taxes in the US, that period will be January 1<sup>st</sup> 2012 to December 31<sup>st</sup> 2012 which is the traditional filing period. If you filed taxes in another country, you may have used a different tax period. However, if you use a tax period other than the traditional period, you must combine the two periods covering parts of 2012 into one 12 month period covering each month of 2012. More guidance will be provided during the verification process. **Do not leave this section blank.**

**TOTAL INCOME** Your total income is your income before taxes are taken out. Do not include scholarships from 2012 in your total income.

How much did you earn from working in 2012? (List amount in the currency in which you earned the funds. Provide a US Dollar conversion using the approved rate on page 1 for your currency. If earned in USD, only list USD.

| Job Title or Company Name | Amount Earned in home currency. Please specify currency. | Conversion Rate from Table 1 | US Dollars Amount |
|---------------------------|--|------------------------------|-------------------|
|                           |  |                              |                   |
|                           |  |                              |                   |

Total:

How many bank accounts do you have? (US and international checking and savings accounts)

|                         | Amount Home Currency | Conversion Rate From Table 1 | US Dollars |
|-------------------------|----------------------|------------------------------|------------|
| Bank Account 1 (amount) |                      |                              |            |
| Bank Account 2 (amount) |                      |                              |            |

**Who Is Considered a Parent?**

Parent refers to a biological or adoptive parent. If your parents are married, give information for both parents even if one is not employed. If you live with one parent who has remarried, give the information for your biological parent and your step-parent. Do not give information for grandparents. If you are married or you were born before January 1<sup>st</sup> 1990, you may skip all of the parental information and continue to the last page.

**PARENT 1**

First Name \_\_\_\_\_  
Last Name \_\_\_\_\_  
Relationship to you \_\_\_\_\_  
Check this box if parent 1 filed, or will file, 2012 taxes   
Check this box if parent 1 was unemployed in 2012

**PARENT 2**

First Name \_\_\_\_\_  
Last Name \_\_\_\_\_  
Relationship to you \_\_\_\_\_  
Check this box if parent 2 filed, or will file, 2012 taxes   
Check this box if parent 2 was unemployed in 2012

**Parent Financial Information**

**PARENT'S TOTAL INCOME** Your parent's total income is their income before taxes are taken out. Please note income for each parent separately. Please see "How to Calculate your Tax Year" from page 2.

**PARENT 1** How much did you earn from working in 2012? (List amount in the currency in which you earned the funds. Provide a US Dollar conversion using the approved rate on page 1 for your currency. If earned in USD, only list USD.)

| Job Title or Company Name | Amount earned in home currency. Please specify currency. | Conversion Rate from Table 1 | US Dollar Amount |
|---------------------------|--|------------------------------|------------------|
| _____                     | _____  | _____                        | _____            |
| _____                     | _____  | _____                        | _____            |
| <b>Total:</b>             | _____  | _____                        | _____            |

**PARENT 2** How much did you earn from working in 2012? (List amount in the currency in which you earned the funds. Provide a US Dollar conversion using the approved rate on page 1 for your currency. If earned in USD, only list USD.)

| Job Title or Company Name | Amount earned in home currency. Please specify currency. | Conversion Rate from Table 1 | US Dollar Amount |
|---------------------------|--|------------------------------|------------------|
| _____                     | _____  | _____                        | _____            |
| _____                     | _____  | _____                        | _____            |
| <b>Total:</b>             | _____  | _____                        | _____            |

**UNTAXED INCOME** List any untaxed income that your parent(s) listed above may have earned in 2012. Untaxed income includes, but is not limited to:

*Child Support | Retirement or Pension Income | Unemployment Wage | Untaxed Pension Contributions | Untaxed Interest*

| Type of Untaxed Income | Amount Earned in home currency. Please specify currency. | Conversion Rate from Table 1 | US Dollar Amount |
|------------------------|--|------------------------------|------------------|
| _____                  | _____  | _____                        | _____            |
| _____                  | _____  | _____                        | _____            |
| <b>Total:</b>          | _____  | _____                        | _____            |

**BANK ACCOUNT INFORMATION** How many bank accounts do your parents have? (Include US and international checking and savings accounts)

|                         | Amount Home Currency | Conversion Rate from Table 1 | US Dollar Amount |
|-------------------------|----------------------|------------------------------|------------------|
| Bank Account 1 (amount) | _____                |                              |                  |
| Bank Account 2 (amount) | _____                |                              |                  |
| <b>Total:</b>           | _____                |                              |                  |

**Parents' Household Information**

List the people living in your parent's household *in addition to* yourself and your parents. If you have siblings attending university and who are also under the age of 24, list them as well. Only list siblings as enrolled if your sibling is attending university for his/her first undergraduate degree. Do not list siblings as attending university if he/she is enrolled in a graduate program.

|           |     |              |                    | Yes                         | No |
|-----------|-----|--------------|--------------------|-----------------------------|----|
| Full Name | Age | Relationship | Name of University | Will be enrolled fall 2013? |    |
|           |     |              |                    | Yes                         | No |
| Full Name | Age | Relationship | Name of University | Will be enrolled fall 2013? |    |
|           |     |              |                    | Yes                         | No |
| Full Name | Age | Relationship | Name of University | Will be enrolled fall 2013? |    |
|           |     |              |                    | Yes                         | No |

Total in Household including yourself, parent(s), and siblings \_\_\_\_\_ Total attending university including you. Do not include Parents. \_\_\_\_\_

**Signatures**

By signing this form, we certify that all the information reported herein for consideration of financial aid is complete and correct at this time. Some information may be an estimate and will be confirmed and/or updated by the submission of verification documents. Both student and parent must sign. Only one parent must sign.

Student's Name (print)

\_\_\_\_\_

Last First Middle

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

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Parent's Name (print)

\_\_\_\_\_

Last First Middle

Parent's Signature \_\_\_\_\_ Date \_\_\_\_\_

**You must print and sign this form. Digital signatures will not be accepted.**

**Your Financial Aid Application must be postmarked on or before March 2<sup>nd</sup> 2013.**