

**Application Information**

The **Soka Dream Financial Aid Application** (this application) is a Soka-specific application used to determine the financial aid **eligibility** of students applying to Soka University who:

- Are **not** eligible to file a federal **FAFSA** application; **AND**
- Do **not** meet the qualifications for California Assembly Bill 540 (AB540), AB 130, and AB 131; and therefore cannot submit a **California Dream Financial Aid Application**.

NOTE: The **Soka Dream Financial Aid Application** is used for university-based financial aid, **not** federal aid.

**California Dream Financial Aid Application (CA AB540) Requirements for Eligibility**

If you meet the following requirements, submit a **California Dream Financial Aid Application**.

If you **DO NOT** meet the following requirements, submit a **Soka Dream Application** (this application).

**California Dream Requirements (CA AB540)**

- **A) Attended a California high school for a minimum of three years; OR B) Attained credits, in California, for the California high school equivalent of at least three years or more of full-time high school coursework AND attained a total of three or more years of attendance in California elementary schools, California secondary schools, or a combination of those schools**
- **A) Have graduated, or will graduate, from a California high school; OR B) Attained a General Education Development (GED), High School Equivalency Test (HiSET), or Test Assessing Secondary Completion (TASC)**
- Will register or enroll in an accredited and qualifying California college or university
- Do not currently hold a valid non-immigrant visa (F, J, H, L, A, B, C, D, E, etc.)
  - NOTE: If you hold a Temporary Protected Status, or hold a "U" Visa, you may be eligible.

**Students who have a Social Security Number issued after completing the Deferred Action for Childhood Arrivals (DACA) process are not eligible for federal financial aid. These students will be required to complete the Soka Dream Financial Aid Application (this application), or complete the California Dream Application, even if they have a Social Security Number that was received through the DACA process.**

**Is the Soka Dream Financial Aid Application the Correct Application for Me?**

1. **I am a U.S. citizen (or a U.S. national):**
  - a. If you are a U.S. citizen or U.S. national, you should file the FAFSA application at [www.fafsa.gov](http://www.fafsa.gov)
2. **I am an "eligible non-citizen":**
  - a. If you meet the definition of "eligible non-citizen," you should file the FAFSA at [www.fafsa.gov](http://www.fafsa.gov)
3. **I am not "a citizen or eligible non-citizen":**
  - a. If you are **not** "a citizen or eligible non-citizen", and **DO NOT** meet the CA AB540 requirements; you should complete a **Soka Dream Financial Aid Application** (this application)
  - b. If you are **not** "a citizen or eligible non-citizen", and **DO** meet CA AB540 requirements; you should complete the **California Dream Act Application** at [www.caldreamact.org](http://www.caldreamact.org)
4. **I am an international student:**
  - a. If you are an international student attending (or planning on attending ) Soka University on a "F1 Student Visa", you should complete the **Soka International Student Financial Aid Application** at [www.soka.edu/admission\\_aid/Financial\\_Aid/Forms.aspx](http://www.soka.edu/admission_aid/Financial_Aid/Forms.aspx)



Date: \_\_\_\_\_

Mobile Phone #: \_\_\_\_\_

You must complete all application sections. Do not leave any question or amount response blank. If a question does not apply, write "N/A" (for Not Applicable) where a response is requested or "0" if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.

Please answer questions using the 2015 twelve-month tax period. The traditional tax period dates are January 1, 2015 to December 31, 2015.

You must submit your completed application, via mail or in-person, by the following deadline!
Application Submission Deadlines
Incoming (First-Year) Students: February 15, 2017
Continuing Students: March 2, 2017

SECTION A: STUDENT INFORMATION

SUA ID# or Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

State of Residence: \_\_\_\_\_ Email Address: \_\_\_\_\_

Citizenship Status: [ ] U.S. citizen [ ] Eligible Non-Citizen
[ ] NOT a Citizen or Eligible Non-Citizen [ ] International

- NOTE 1: If you are a U.S. citizen or permanent resident, STOP HERE. You must complete a FAFSA Application
NOTE 2: If you are not a U.S. citizen or permanent resident, and meet CA AB540 requirements, STOP HERE. You must complete a California Dream Application
NOTE 3: If you are an international student, STOP HERE. You must complete the Soka International Student Application

Marital Status: [ ] Single [ ] Married [ ] \*\*Separated [ ] \*\*Divorced [ ] Widowed

\*\* Date of Separation (if Separated or Divorced): \_\_\_\_\_

Student's Income and Assets - 2015 income, converted to US Dollars (USD). If earned in USD, list only USD figures.

NOTE: Do not leave any items blank. Enter "0" for items with no value.

Income/Earnings: \_\_\_\_\_ US Dollar Amount Check Here if Unemployed? [ ] Unemployed?

Taxes Paid: \_\_\_\_\_

Adjusted Gross Income: \_\_\_\_\_

\*\*\*Total Checking & Savings: \_\_\_\_\_

\*\*\* Use the amounts you have in checking or savings accounts as of the date you file this application.



**SECTION B: FAMILY INFORMATION (HOUSEHOLD SIZE)**

Total number of family members in the household; including yourself, parent(s), and siblings: \_\_\_\_\_

Total number of family members in your home attending college, including you (do not include parents): \_\_\_\_\_

Please list each of your siblings who *individually* meet **all** of the following conditions:

- Are under the age of 24
- Are attending a college or university, and meet **all** of the following conditions:
  - Attend classes at least half-time (6 credit hours)
  - Are working towards their **first** undergraduate degree
  - Began classes on or after August 1, 2016

1. Full Name: \_\_\_\_\_ Age: \_\_\_\_\_ College Name: \_\_\_\_\_

2. Full Name: \_\_\_\_\_ Age: \_\_\_\_\_ College Name: \_\_\_\_\_

3. Full Name: \_\_\_\_\_ Age: \_\_\_\_\_ College Name: \_\_\_\_\_

**SECTION C: PARENTS' INFORMATION**

The term “*Parent*” refers to a biological or adoptive parent. If your parents are married, list information for both parents, even if one is not working. If you live with one parent who has re-married, list information for both your biological parent and your step-parent.

**(If you, the student, are over the age of 24 or married, you may skip this section and sign in *Section E*).**

Parent 1 Name: \_\_\_\_\_

Parent 2 Name: \_\_\_\_\_

**Parents' Current Marital Status:**

- Single    
  Married    
  Re-Married    
  \*\*Separated    
  \*\*Divorced    
  Widowed

**\*\*Date of Separation (if Separated or Divorced):** \_\_\_\_\_



**SECTION C (continued): PARENTS' INFORMATION**

**Parents Income** – 2015 income, converted to US Dollars (USD). If earned in USD, list only USD figures.

**NOTE:** Do not leave any items blank. Enter "0" for items with no value.

	<u>US Dollar Amount</u>	<u>Check Here if Unemployed</u>
*Parent 1 Income:	_____	<input type="checkbox"/> Unemployed?
Parent 1 Taxes Paid:	_____	
*Parent 2 Income:	_____	<input type="checkbox"/> Unemployed?
Parent 2 Taxes Paid:	_____	
**Other/Un-taxed Income:	_____	

\* **Answer the questions using the 2015 twelve-month tax period.** The traditional tax period is January 1, 2015 to December 31, 2015. If taxes were completed in another country, you may use July 1, 2014 to June 30, 2015.

\*\* **Other/Un-taxed Income** includes child support, interest, dividends, retirement income, unemployment wages, un-taxed pension contributions, un-taxed interest, business income, real estate, etc. at the time of this application.

**Parents Assets**

**NOTE:** Do not leave any items blank. Enter "0" for items with no value.

	<u>US Dollar Amount</u>
Total Checking & Savings:	_____
*Investments:	_____

\* List amounts held in stocks, bonds, businesses, real estate, or other investments at the time of this application

**SECTION D: SUBMISSION INFORMATION**

Please do not submit any other income tax or bank documents with this application until receiving further notification from our office.

Please check your "To Do List" for any incomplete or missing documents by logging into your Soka "Learn" Account at: <http://learn.soka.edu>

For more information, please visit our university website at: [www.soka.edu/financialaid](http://www.soka.edu/financialaid)

To view current currency exchange rates, please visit:  
[www.irs.gov/Individuals/International-Taxpayers/Yearly-Average-Currency-Exchange-Rates](http://www.irs.gov/Individuals/International-Taxpayers/Yearly-Average-Currency-Exchange-Rates)

Please mail this form, or deliver this form in-person, and include any supporting documents. If you choose to submit information via email, SUA will not be responsible for any data security breach, and we may still request that you submit original documents.

**Applications can be mailed or delivered in-person to:**

Soka University of America  
Office of Financial Aid  
Founders Hall, Room 216  
1 University Drive  
Aliso Viejo, CA 92656  
USA

**SECTION E: SIGNATURE(S)**

By signing this form, we certify that all the information reported on this application is complete and accurate to the best of our knowledge. Some information may be an estimate and will be confirmed and/or updated by the submission of verification documents (i.e., tax returns, bank statements, etc.) I understand that any false statements or misrepresentation may be cause for denial, reduction, withdrawal, and/or repayment of financial aid, and that I may be subject to a fine. (If you were born before January 1, 1993, your parents do not need to sign this form.)

<b>Student Name (print)</b>	<b>Signature</b>	<b>Date</b>
<b>Parent Name (print)</b>	<b>Signature</b>	<b>Date</b>