Soka University of America

Office of Financial Aid

2027-2028 International and Soka Dream Financial Aid Application Worksheet

THIS WORKSHEET IS NOT YOUR APPLICATION. DO NOT SEND IT TO SOKA.

Use it to gather what the online application asks for; nothing you write here is sent to Soka. Its sections follow the application's pages in order. Fill in only what applies to you, and write 0 for an amount that does not apply. Then apply online in one sitting, with the link on the last page. **Printing is optional:** fill it in on screen, or write your answers on any paper or in your phone's notes. If you print, you need only the pages after this cover and before the Glossary.

What you will need

- ☐ Your 2025 tax return, or your income records if you did not file one, and the same for your parents (dependent students) or your spouse (married students), covering January 1 to December 31, 2025
- ☐ Today's balances of cash, checking and savings accounts, the value of any investments, and the currency each is in
- ☐ Records of any untaxed income or support in 2025: housing or food allowances, money others gave you or bills they paid, veteran benefits
- ☐ Your SUA ID or your go.soka.edu application ID, and the email address you will use
- ☐ Names and dates of birth of your parents or spouse and of the people in your household
- ☐ For any investment property or business your family owns: its value, its debt and the percent owned
- ☐ Child support paid or received in 2025
- ☐ Award letters for outside scholarships, grants or loans for 2027-2028 (international students)

How to apply

1. Fill in this worksheet.
2. Apply online in one sitting (about 30 minutes), with the link on the last page.
3. Watch your email for your summary and certification sheet.
4. Print it, sign it by hand, and return it with the documents it lists.

Dates and help

Deadlines: incoming students February 15, 2027; continuing students March 2, 2027. Late submission may reduce your grants or scholarships.

The right application: this one is for international and Soka Dream students. U.S. citizens and eligible non-citizens apply with the FAFSA (fafsa.gov), and students who meet California's AB540 requirements with the California Dream Act Application (dream.csac.ca.gov); the application's first questions will direct you.

Online programs: students enrolled only in an online program are not eligible to apply for financial aid through Soka.

Questions? Email financialaid@soka.edu or call (949) 480-4342.

About you

Person	Last name (surname)	First name	Date of birth	SUA ID or application ID	Email
Student					

The first page also asks whether you are a new (incoming) or a continuing student, and your citizenship or immigration status. Your SUA ID is 7 digits and begins with 0. No SUA ID yet? Enter the 8- or 9-digit application ID from the Financial Aid page of your go.soka.edu account, or leave the box blank if you have neither. Numbers only, with no spaces or dashes. Continuing students, and anyone with an SUA email address, use that address; everyone else, the personal email address you gave Admissions, not one shared with family.

Your dependency status

Question	Your answer
Your program for 2027-2028: undergraduate or graduate (graduate students: which program or programs)	
Your marital status today	

You are an independent student if any of these is true. Check each one that applies:

- ☐ You will be a graduate student in a master's program at Soka in 2027-2028.
- ☐ You were born before January 1, 2004.
- ☐ You are married today (separated, divorced and widowed do not count).
- ☐ You have children who receive more than half of their support from you.
- ☐ At any time since you turned 13, both of your parents were deceased, or you were in foster care or a dependent or ward of the court.

Any box checked: you are independent; skip Your parent(s). **None checked:** you are dependent; fill in Your parent(s), and a parent signs your summary sheet.

Your parent(s) (dependent students)

Question	Your answer
Your parents' marital status today	
Widowed parent only: did your parent report the 2025 income or taxes of their spouse who died (for example, on a joint return)?	

Report both parents, combined, if they are married, re-married or unmarried and living together, or if your widowed parent reported the late spouse's income (the parent who died is Parent 2). Otherwise report one parent: if your parents are divorced or separated, the one you lived with more during the past 12 months.

Parent	Full name	Date of birth
Parent 1, or the one parent you report		
Parent 2 (both parents only)		

Your parents' 2025 figures (both together, or your one parent's)	Your answer
Currency of these amounts (the one most of your parents' 2025 income was in)	
Tax situation for 2025: no income, income but no tax return required, non-U.S. return, U.S. return, or both	
Filing status on the tax return, such as single, married filing jointly or head of household (only if a tax return was filed)	
Total income, before tax (only if a tax return was filed)	
Total tax assessed (only if a tax return was filed)	
Income earned from work: Parent 1, or your one parent (unless no income)	

Your parents' 2025 figures (both together, or your one parent's)	Your answer
Income earned from work: Parent 2 (both parents only, unless no income)	
Cash, checking and savings balance today, in this currency	
Cash and savings in a different currency, if any: total and currency	
Investments value today, in this currency	
Investments in a different currency, if any: total and currency	
Child support received in 2025	
Untaxed housing, food or other living allowances (not on a tax return)	
Other money received, or bills someone else paid (including income not on a tax return)	
Veteran non-educational benefits	

Your income and assets

If you are married, your spouse answers with you: write your spouse's names and date of birth here, and your figures combined with your spouse's.

Spouse (if you are married)	Last name (surname)	First name	Date of birth
Spouse			

Your 2025 figures (combined with your spouse's, if you are married)	Your answer
Currency of these amounts (the one most of your 2025 income was in)	
Tax situation for 2025: no income, income but no tax return required, non-U.S. return, U.S. return, or both	
Filing status on the tax return, such as single, married filing jointly or head of household (only if a tax return was filed)	
Total income, before tax (only if a tax return was filed)	
Total tax assessed (only if a tax return was filed)	
Income earned from work: yours (unless no income)	
Income earned from work: your spouse's (married students only, unless no income)	
Cash, checking and savings balance today, in this currency	
Cash and savings in a different currency, if any: total and currency	
Investments value today, in this currency	
Investments in a different currency, if any: total and currency	
Child support received in 2025	
Untaxed housing, food or other living allowances (not on a tax return)	
Other money received, or bills someone else paid (including income not on a tax return)	
Veteran non-educational benefits	

Income and tax: income earned from work is each person's own; total income adds any other income. With no return, only income from work is asked; put any other income under other money. If a tax year does not match the calendar year, take the 2025 months from both returns.

Your household

Household member (not you, your spouse or the parents you report)	Full name	Relation to you	Date of birth
Person 1			
Person 2			
Person 3			
Person 4			
Person 5			

Who to list: dependent students list their parents' other children whom the parents support, even at college, and anyone else the parents support who lives with them through June 30, 2028. Independent students list the children they support and anyone else they support who lives with them. Do not list foster children. List any beyond five in the form's last household box, one per line.

Property, business and child support paid

DO NOT LIST the home your family lives in. Enter the value and debt of the WHOLE property or business and the percent your family owns; Soka works out the share. Enter these amounts and your awards in your currency (from Your income and assets). The form also asks about a second property, business and child support arrangement, and its last box takes any others.

Real estate, business or farm	Address; for a business or farm, also its name, what it does and its full-time employees	Owner	Percent owned	Full value	Debt or mortgage
Property					
Business or farm					

Child support paid (divorce or separation)	Paid by	Child's name and age	Paid to	2025 total
Arrangement				

Outside scholarships, grants and loans (international students)

Award for 2027-2028	Name and source	Type (scholarship, grant or loan)	Amount
Award 1			
Award 2			
Award 3			

The form has room for five awards, and its last box takes any others.

Glossary

You do not need to print this page or the ones after it: read them on screen.

- **AB540:** California's requirements for students who attended high school in California (the application lists them). If you meet them, the application directs you to the California Dream Act Application; if you are not sure, email financialaid@soka.edu first.
- **Applicant type:** Incoming: new to Soka in the coming year (first-year, transfer or new graduate student). Continuing: already a Soka student.
- **Business or investment farm:** A business, or a farm held as an investment, that you, your spouse or your parents own in whole or in part.
- **Calendar year 2025:** Income and tax figures cover January 1 to December 31, 2025. If a tax year does not match (for example, April to March), take the 2025 months from both returns and send both.
- **Cash and savings:** Cash, and money in checking and savings accounts, in any country: one total in the page's currency, and one in a different currency if you have any.
- **Child support:** Money a parent who does not live with a child pays toward the child's living costs, usually under a divorce or separation agreement or a court order. Received: what you, your spouse or your parents received in 2025 (not foster care payments). Paid: what any of you paid in 2025 for a child who does not live in your household.
- **Combined:** Both people's figures added together: both parents', or yours and your spouse's. A joint return's figure is already combined.
- **Currency:** The one you choose on each money page, the currency most of that income was in; yours also covers the pages after Your income and assets. Soka converts every amount to U.S. dollars at one fixed rate for the year.
- **Filing status:** How a tax return was filed: single, married filing jointly (one return together), married filing separately, head of household, or qualifying surviving spouse. Choose the closest match for a return from any country.
- **Full value, debt and percent owned:** The market value and the debt of the WHOLE property or business, and the share your family owns. Soka works out the share.
- **Household:** You; your parent(s) (dependent students) or your spouse (married students); and the people you list: children you or your parents support, and anyone else who lives with you or them and gets more than half of their support from you or them through June 30, 2028. Never foster children.
- **Income earned from work:** Wages, salaries and tips, plus net earnings from self-employment or a business or farm, before taxes; always each person's own.
- **Independent student:** A student for whom any of the five statements in Your dependency status is true: a graduate student in a master's program, or an undergraduate born before January 1, 2004, married, supporting a child, or an orphan, in foster care or a ward of the court after turning 13. An independent student does not report their parents' information; any other student does, and a parent signs the summary sheet.
- **Investment real estate:** Property other than the home your family lives in, such as a rental property or land.
- **Investments:** Brokerage and investment accounts, stocks, bonds, mutual funds, money market funds, certificates of deposit, trust funds and education savings plans. Not retirement plans, life insurance, your primary home, real estate or a business.
- **Other money:** Money received that is not reported anywhere else on the application, such as income not on a tax return, money from relatives or a sponsor, or bills someone else paid. It does not include birthday or holiday gift money.
- **Parent:** A biological, adoptive or step-parent. Report both parents if they are married, or not married but living together; if your parents are divorced or separated, the one you lived with more during the past 12 months (and a step-parent married to that parent).
- **SUA ID:** Your 7-digit Soka student ID, which begins with 0. Continuing students must enter it; new students without one may enter the 8- or 9-digit application ID from the Financial Aid page of their go.soka.edu account.
- **Summary and certification sheet:** Emailed after you submit: a summary of your answers, a Corrections column and your document checklist. Print it, sign it by hand (with a parent or your spouse where required) and return it with your documents.
- **Tax situation:** What is true for 2025: no income; income but no tax return required; a non-U.S. return; a U.S. return (Form 1040 or 1040-NR); or both. It decides which income and tax questions follow.

- **Total income:** All income before tax: income from work plus other income, such as interest, dividends, pensions, rent or unemployment benefits.
- **Total tax assessed:** The full income tax for 2025 on the tax return or tax assessment notice; not a refund, and not just the balance still to pay.
- **Untaxed living allowances:** Housing, food or other living allowances received as part of a job or role and not reported on a tax return, such as a military or clergy allowance. Most people enter 0.
- **Veteran non-educational benefits:** U.S. Department of Veterans Affairs benefits only, such as disability or a death pension. Most people enter 0.

Questions and answers

Is this worksheet my application? No. Nothing you write here is sent to Soka. Gather your figures here, then fill in the online application in one sitting.

Am I a dependent or an independent student? Use the checklist in Your dependency status: if any of its five statements is true for you, you are independent; if none is, you are dependent.

Which year do I report? Calendar year 2025 for you, your spouse and your parents. If a tax year does not match the calendar year, take the 2025 months from both returns and send both.

Which currency do I use? The one you choose on each money page. Savings and investments in a different currency have their own questions (a third currency goes in the form's last box); convert any other amount at today's exchange rate. Soka converts every amount to U.S. dollars after you submit.

My parents are divorced or separated. Whom do I report? The parent you lived with more during the past 12 months, and that parent's spouse if they have remarried.

One of my parents died. What do I answer? Choose Widowed. If your parent's 2025 income or taxes included the parent who died (for example, a joint 2025 return), answer Yes and report both, the parent who died as Parent 2; otherwise answer No and report your living parent.

No tax return was filed. What do I enter? Choose the tax situation that fits. With no income, the income questions are skipped; with income but no return required, only income from work is asked. Put any other income, such as a pension, under other money.

I am married. Does my spouse take part? Yes. You answer one page for both of you, with your figures combined, and your spouse also signs your summary sheet.

Can I save the form and finish later? No. The form saves your answers only when you select Submit at the end; it cannot save a partly completed application. Set aside about 30 minutes and finish in one sitting, with this worksheet and your documents beside you.

I made a mistake after submitting. What do I do? Do not submit again. Email financialaid@soka.edu from the email address you entered, or write the correction in the Corrections column of your summary sheet.

What happens after I submit? Your summary and certification sheet arrives by email. Check it, write any correction in its Corrections column, sign it by hand (a parent signs for a dependent student, a spouse for a married student) and return it with the documents it lists.

When you are ready to apply

When everything above is ready, open the application: https://forms.cloud.microsoft/r/S78N753mE1

- Set aside about 30 minutes in one sitting: the form saves your answers only when you submit, and closing it before then loses them.
- Use a computer browser (Chrome, Edge, Safari or Firefox), not a link opened inside an app; do not refresh, press Back or open the form twice.
- Only the confirmation screen ("Your response has been recorded.") means your application was received. Then watch your email for your summary and certification sheet.
- Submit once. To correct an answer afterwards, email financialaid@soka.edu from the email address you entered; do not submit the application again.

Keep this worksheet; do not send it. Questions? Email financialaid@soka.edu.