



## Instructions for Completing the Soka International Student Financial Aid Application

This form should be completed by all international non-U.S. graduate resident students applying to Soka University, for classes beginning in the Fall of 2021, who are applying for any financial aid.

**You must submit your completed application, along with all required supporting documents, via mail or in-person, by the following deadline!**

### Application Submission Deadlines

**Incoming (First-Year) Students: February 15, 2021**

**Continuing Students: March 2, 2021**

**WARNING!** Late application or documentation submissions will result in a **reduction** of grants or scholarships.

- **Collect the following documentation to assist with completing this application:**
  - **Tax Returns and Income Documentation:**
    - **Non-U.S. tax returns** – Must show ‘Total Income’ and ‘Total Tax Assessed’ amounts.
    - **U.S. tax returns** – This includes tax transcripts, IRS Form 1040NR, or IRS Form 1040.
    - **For non-tax return filers** – Income documentation that shows ‘Total Income’.
    - **NOTE:** ‘Income’ and ‘Tax Assessed’ figures should include the entire 12-month “2019 tax period”. The United States 2019 tax period is January 1, 2019 to December 31, 2019. If you (or your spouse) filed taxes in a country that uses a “fiscal” tax period (such as July 1, 2018 to June 30, 2019), use/submit income and tax documents for **both** the 2018-2019 and 2019-2020 fiscal years; to include **all** 2019 income.
  - **Bank, Brokerage, and Investment Account Statements.** Do not include “retirement” accounts.
  - **Investment Real Estate or Business(es) owned by you.**
  - **Grant and Scholarship Documentation**
  - **Any other miscellaneous funds earned by, or paid to, you.**
- All non-English language documents must be submitted in English-translated form and include an official translation certification form.
- All monetary values must be submitted in both their local currency value and US dollar conversion value.
- Complete **all** application sections. Do not leave a question or amount response blank. If a question does not apply, use “**N/A**” (Not Applicable) where a response is requested, or use “**0**” if an amount is requested. Forms submitted with blanks will be considered incomplete and may delay receipt of financial aid.
- Submit additional sheets along with this application if more room is required to answer any question.
- Do not submit this cover page along with your application.
- Students previously admitted to SUA should include their seven-digit “SUA Student ID#” on this form. First-time SUA applicants will not have an SUA ID# and should leave this field blank.
- **NOTE: Soka University of America may request additional supporting documentation for any information or monetary figure submitted on this form.**



**OFFICE OF FINANCIAL AID**

**Name (Last, First, MI):** \_\_\_\_\_

**SUA Student ID#:** \_\_\_\_\_

Please use the appropriate conversion rate listed below when calculating all non-U.S. dollar monetary values in this application. Use this same currency rate when having your financial documents professionally translated. If you do not see your country listed, please contact the Soka Office of Financial Aid for the proper conversion rate. The Soka Office of Financial Aid reserves the right to refuse documents that use different conversion rates.

Country	Currency	USD	Exchange Rate
Afghanistan	AFN	\$1	77.0125
Albania	ALL	\$1	105.602
Argentina	ARS	\$1	76.2430
Australia	AUD	\$1	1.39147
Bangladesh	BDT	\$1	84.6822
Bosnia and Herzegovina	BAM	\$1	1.66504
Brazil	BRL	\$1	5.6409
Bulgaria	BGN	\$1	1.66507
Cambodia	KHR	\$1	4099.36
Cameroon	XAF	\$1	558.442
Canada	CAD	\$1	1.32906
Caribbean	XCD	\$1	2.70239
China	CNY	\$1	6.7905
Congo (Kinshasa)	CDF	\$1	1952.34
Denmark	DKK	\$1	6.33738
Egypt	EGP	\$1	15.7449
Ethiopia	ETB	\$1	36.7191
France	EUR	\$1	0.8514
Georgia	GEL	\$1	3.2189
Germany	EUR	\$1	0.8514
Ghana	GHS	\$1	5.7917
India	INR	\$1	73.208
Indonesia	IDR	\$1	14838.8
Italy	EUR	\$1	0.8514
Japan	JPY	\$1	105.542
Kenya	KES	\$1	108.448
Liberia	LRD	\$1	198.849
Malawi	MWK	\$1	749.874
Malaysia	MYR	\$1	4.150
Mexico	MXN	\$1	21.8959
Mongolia	MNT	\$1	2860.8
Morocco	MAD	\$1	9.2472

Country	Currency	USD	Exchange Rate
Myanmar	MMK	\$1	1295.96
Nepal	NPR	\$1	117.675
Netherlands	EUR	\$1	0.8514
New Zealand	NZD	\$1	1.5044
Nigeria	NGN	\$1	381.461
Pakistan	PKR	\$1	165.069
Peru	PEN	\$1	3.605
Philippines	PHP	\$1	48.479
Poland	PLN	\$1	3.8158
Russia	RUB	\$1	77.4991
Rwanda	RWF	\$1	974.691
Singapore	SGD	\$1	1.36301
South Africa	ZAR	\$1	16.6432
South Korea	KRW	\$1	1163.1
Spain	EUR	\$1	0.8514
Sri Lanka	LKR	\$1	184.853
Sweden	SEK	\$1	8.9217
Switzerland	CHF	\$1	0.9187
Taiwan	TWD	\$1	28.883
Tajikistan	TJS	\$1	10.3238
Thailand	THB	\$1	31.5611
The Gambia	GMD	\$1	51.7837
Tunisia	TND	\$1	2.744
Turkey	TRY	\$1	7.739
Uganda	UGX	\$1	3710.07
Ukraine	UAH	\$1	28.3714
United Arab Emirates	AED	\$1	3.6725
United Kingdom	GBP	\$1	0.77566
Vietnam	VND	\$1	23144.84
Zambia	ZMW	\$1	20.0453
Zimbabwe	ZWD	\$1	361.9



Name (Last, First, MI): \_\_\_\_\_ SUA Student ID#: \_\_\_\_\_

**SECTION A: DEMOGRAPHIC INFORMATION**

Complete **all** application sections and fields leaving no question or amount response blank. If a question does not apply, write “**N/A**” (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.

**PART A1: STUDENT (& SPOUSE) INFORMATION**

Name (Last, First, MI): \_\_\_\_\_ SUA Student ID#: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

\*Country of Citizenship: \_\_\_\_\_ Email Address: \_\_\_\_\_

\* *NOTE: If you are a US citizen or a permanent resident, STOP HERE. You **must** apply to SUA as a Domestic Student.*

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

\* Name of Spouse (if Married): \_\_\_\_\_

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

**Dislocated Workers/Displaced Homemakers**

As of today, are either you or your spouse a “dislocated worker” or “displaced homemaker?”

Yes  No

A person is considered “dislocated” if he/she meets one of the following conditions: (a) has lost his/her job, (b) has been laid off, (c) is receiving unemployment benefits due to layoff, (d) was self-employed, but is now unemployed due to economic conditions or natural disasters. (*Verification documentation may be requested.*)

OFFICE OF FINANCIAL AID

Name (Last, First, MI): \_\_\_\_\_ SUA Student ID#: \_\_\_\_\_

**PART A2: FAMILY HOUSEHOLD INFORMATION**

List the people living in your household. Please include:

- Yourself, and your spouse (if married).
- Your dependent children, even if they do not live with you. List only family members whom you provide more than half of their support **OR**, family members that would be required to provide your information when applying for student aid. Do not include foster children.
- Other members; only if: (a) they live with you, **AND** (b) you provide more than half of their support, **AND** (c) you will continue to provide support from July 1, 2021 through June 30, 2022.
- College information for any household member that will enroll in college at least half-time during the 2021-2022 academic year.

Full Name of Household Member	Relation to Student	Born on or after January 1, 1998	List only family members who will enroll at least half-time in college during 2021-2022*		
			Name of College	Type of Degree (BA, MA, etc.)	Year in College for 2021-2022 (1,2,3, or 4)
	Yourself	N/A	Soka University		
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			
		<input type="checkbox"/> Yes <input type="checkbox"/> No			

\* Verification of college enrollment may be requested from you at a later date. Please note that we will not consider college enrollment for: (a) parents, (b) foster children, or (c) family members attending a foreign college, a military school, a non-financial aid recipient college, or those enrolled in graduate/professional schools.

**If any member of your household (listed in the previous table) is not your spouse or child, please explain how and why your family is financially supporting this person:**

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Name (Last, First, MI): \_\_\_\_\_

SUA Student ID#: \_\_\_\_\_

**SECTION B: TAX AND INCOME INFORMATION**

Complete all application sections and fields leaving no question or amount response blank. If a question does not apply, write "N/A" (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.

**PART B1: TAX RETURN NON-FILERS (Did not file ANY tax returns, in any country.)**

2019 Tax Return Non-Filer Information	STUDENT	SPOUSE
	For each person listed, check only <u>one</u> box to either Question 1 or Question 2, but not both!	
1) Check the box for any person that <u>did not</u> earn ANY income in 2019.	<input type="checkbox"/>	<input type="checkbox"/>
2) Check the box for any person that <u>did</u> earn income in 2019, and <u>was not</u> required to file a 2019 tax return.	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>FOR ALL PERSONS WITH BOXES CHECKED FOR QUESTION #2 ABOVE:</b></p> <p><b>If they worked <u>in</u> the U.S.:</b> Attach IRS Form W-2 for all sources of income. For any sources of income for which they do not have an IRS Form W-2, please attach a signed statement listing these sources of income, the amounts earned from each source, and an explanation of why they are unable to provide a W-2 form.</p> <p><b>If they worked <u>outside</u> of the U.S.:</b> Attach income statement forms for all sources of income. For any sources of income for which they do not have an official statement of income, please attach a signed statement listing these sources of income, the amounts earned from each source, and an explanation of why they are unable to provide an official statement of income form. Provide monetary values in <u>both</u> U.S dollars and local currency amounts, using the currency conversion information from the chart on <b>Page 2</b>.</p>		

**PART B2(a): TAX RETURN FILERS (Filed a tax return in a country other than the United States.)**

Answer the following questions regarding non-U.S. tax return filings for non-U.S. income earned or gained.

2019 Non-U.S. Tax Return Filer Information	STUDENT	SPOUSE
Check the box for any person that filed a <u>non-U.S. tax return</u> for the 2019 tax year. If your home country is on a fiscal tax year, and not on a calendar tax year, use both the 2018-2019 and 2019-2020 tax years.	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>FOR ALL PERSONS WITH BOXES CHECKED IN THE QUESTION ABOVE:</b></p> <ol style="list-style-type: none"> <li>Attach all original tax documents. <b>Include a signed, translated, notarized copy for each tax document.</b></li> <li>Tax document submissions must have all monetary figures converted to U.S. dollars using the currency conversion rates listed in the chart on <b>Page 2</b>. Currency conversion information (symbol, rate, &amp; date) must be clearly stated.</li> </ol>		

Name (Last, First, MI): \_\_\_\_\_

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**PART B2(b): TAX RETURN FILERS, continued (Filed a U. S. tax return for non-residents of the U. S.)**

Answer the following questions for any non-U.S resident that filed a U.S. IRS 1040NR tax form.

2019 U.S. IRS 1040NR Tax Filer Information		
	STUDENT	SPOUSE
Check the box for any person that <u>filed</u> , or <u>will file</u> , a U.S. IRS 1040NR tax return (U.S. Non-Resident Alien Income) for 2019 tax year.	<input type="checkbox"/>	<input type="checkbox"/>
<b>FOR ALL PERSONS WITH BOXES CHECKED FOR THE QUESTION ABOVE:</b> Attach an official copy of any completed tax form, or an official tax transcript, and submit with this application.		

**PART B3: TOTAL INCOME & TOTAL TAX ASSESSED**

Enter the 'Total Income' & 'Total Tax Assessed' values into the table below by adding the figures obtained from forms gathered in sections PART B1 and PART B2.

The figures entered below should represent income totals, regardless of income origin.

Be sure to list totals in both 'Home Currency' and 'U.S. Dollars', using the currency conversion chart on **Page 2**. If income was earned in the U.S., enter "N/A" in the 'Home Currency' column.

2019 Total Income & Total Tax Assessed Information					
List the following totals for any person who earned any income in 2019 (*see NOTE below)		Home Currency	U.S. Dollars	FOR STAFF USE ONLY (Home/US)	
STUDENT	Total Income				
	Total Tax Assessed				
SPOUSE	Total Income				
	Total Tax Assessed				

\* **NOTE:** 'Income' and 'Tax Assessed' figures should include the entire 12-month "2019 tax period". The United States 2019 tax period is January 1, 2019 to December 31, 2019. If you (or your spouse) filed taxes in a country that uses a "fiscal" tax period (such as July 1, 2018 to June 30, 2019), use & submit income and tax documents for both the 2018-2019 and 2019-2020 fiscal years; to include **all** 2019 income.

Name (Last, First, MI): \_\_\_\_\_

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**PART B4: UNTAXED INCOME INFORMATION**

2019 Untaxed Additional Income Information	STUDENT	SPOUSE
	Totals from 1/1/19 to 12/31/19 (U.S. dollars)	
List the 'Total Child Support' <b>received</b> for any of your children. <b>Do not</b> include foster children.		
List the total of housing, food, and other living allowances paid to any members of the military, clergy, or others (including cash payments and cash value of benefits). <b>Do not</b> include the value of on-base military housing or the value of a basic military allowance for housing.		
List the total of <b>any other</b> money you and/or your spouse received on your behalf that is <b>not reported</b> elsewhere on this form. (e.g., bills paid for you, etc.)		

**PART B5: ADDITIONAL FINANCIAL INFORMATION**

2019 Additional Financial Information				
List the 'Total Child Support' <b>paid out</b> because of divorce or separation. Do not include support for family members listed in the table located in the <b>PART A2: FAMILY INFORMATION</b> section of this form.				
Full Name of Person Who Paid Child Support	Full Name of Child for Whom Support was Paid	Age of Child	Full Name of Person to Whom Support was Paid	Total Paid

OFFICE OF FINANCIAL AID

Name (Last, First, MI): \_\_\_\_\_

SUA Student ID#: \_\_\_\_\_

**SECTION C: BANK ACCOUNTS, INVESTMENTS, & ASSETS**

Complete all application sections and fields leaving no question or amount response blank. If a question does not apply, write "N/A" (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 provide information for all accounts and assets held by you and/or your spouse.**

Calculate 'Home Currency' and/or 'U.S. Dollar' balances using the currency conversion chart on **Page 2**.

**PART C1: ACCOUNT BALANCES AND NET WORTH**

List total account balance information for yourself and your spouse, as of the date of this application.

Be sure to check the box for every person who does NOT hold ANY accounts.

**NOTE: SUA may request copies of statements for verification of balances for any account listed.**

**Accounts to include:** Bank accounts (checking, savings, etc.), Brokerage (investment) accounts, Trust funds, UGMA and UTMA accounts, Money market funds, Mutual funds, Certificates of deposit, Stocks, Stock options, Bonds, Other securities, Installment and Land sale contracts, Commodities, etc. Include the value of all qualified education accounts such as Coverdell savings accounts, 529 college savings plans, and Refund values of 529 pre-paid tuition plans.

**Accounts to exclude:** Life insurance policies, Designated retirement plans (e.g., 401k, 403b, Pension funds, Annuities, Non-education IRAs, etc.)

Bank (Checking & Savings) and Brokerage (Investment) Account Balance Information						
Provide the TOTAL BALANCE for every account held at any U. S. (domestic) or international institution. Figures entered below should represent account balances as of the date of this application.						
Owner	Check if this person has no accounts.	Account Type (Bank, Brokerage, etc.)	Home Currency Balance	U.S. Dollars Balance	FOR STAFF USE ONLY (Home/US)	
STUDENT	<input type="checkbox"/>					
STUDENT						
STUDENT						
STUDENT						
STUDENT						
SPOUSE	<input type="checkbox"/>					
SPOUSE						
SPOUSE						
SPOUSE						
SPOUSE						



Name (Last, First, MI): \_\_\_\_\_

SUA Student ID#: \_\_\_\_\_

**PART C2: INVESTMENT REAL ESTATE**

**IMPORTANT!: DO NOT include the primary residence that you or your spouse live in on a daily basis.**

Provide details for all investment real estate held by you or your spouse. Attach additional sheets if needed.

“Investment Real Estate” includes: Real estate other than your primary residence, rental property, mobile homes, condominiums, duplexes, land, summer homes, etc.

Investment Real Estate Information			
PROPERTY #1			
Property Address			
Held By	<input type="checkbox"/> Student	<input type="checkbox"/> Spouse	<input type="checkbox"/> Jointly
Original Purchase Price (USD)	Current Market Value (USD)	Current Mortgage Loan Balance (USD)	

Investment Real Estate Information			
PROPERTY #2			
Property Address			
Held By	<input type="checkbox"/> Student	<input type="checkbox"/> Spouse	<input type="checkbox"/> Jointly
Original Purchase Price (USD)	Current Market Value (USD)	Current Mortgage Loan Balance (USD)	

**PART C3: BUSINESS INFORMATION**

Provide information for any businesses or investment farms owned by you and/or your spouse.

Do not include businesses with 100 or fewer full-time employees, or designated “family farms”.

Documents will be sent to you requesting further information. Attach additional sheets if needed.

Business or Investment Farm Information				
BUSINESS #1				
Business Address				
Business Name & Nature				
Held By	<input type="checkbox"/> Student	<input type="checkbox"/> Spouse	<input type="checkbox"/> Jointly	Percent of Ownership Interest
Business Market Value (USD) (100% value, not % of ownership)	Business Debt (USD) (100% debt amount, not % of ownership)		Number of Full-time Employees	

Name (Last, First, MI): \_\_\_\_\_ SUA Student ID#: \_\_\_\_\_

**SECTION D: OUTSIDE FUNDING**

Complete all application sections and fields leaving no question or amount response blank. If a question does not apply, write "N/A" (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.

List ANY outside funding that has been paid, or that will be paid, directly to you for the upcoming 2021-2022 academic year in the form of a scholarship, grant, or loan.

For each item listed below, submit documentation providing details for the funding.

**IMPORTANT NOTE:** If you receive notification of ANY additional Outside Funding after submitting this application, you are required to immediately notify the SUA Office of Financial Aid.

2021-2022 School Year - Outside Funding Information		
Name and Source of Funding	Type of Funding	Amount of Funding (U.S. dollars)
<i>Example: Japanese Student Services Organization (JASSO)</i>	<input type="checkbox"/> Scholarship <input checked="" type="checkbox"/> Grant <input type="checkbox"/> Loan	\$10,000
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	
	<input type="checkbox"/> Scholarship <input type="checkbox"/> Grant <input type="checkbox"/> Loan	



Name (Last, First, MI): \_\_\_\_\_ SUA Student ID#: \_\_\_\_\_

**SECTION E: SUBMISSION INFORMATION**

1) If you are a current Soka student, or an admitted Soka applicant, please review all "To Do List" items for incomplete items or missing documents at:

<http://learn.soka.edu>

- Locate the "To Do List" section on the right of the screen.
- Click the 'more' link to display an extended list of your To Do List items.
- Incomplete documents will display with a status of "Initiated" or "Notified".

2) Return this completed form to the Soka University Office of Financial Aid.

Please mail in this form, or deliver this form in-person, along with include any supporting documents.

If you choose to submit information via email, SUA will not be responsible for any data security breach, and may still request that you submit original documents.

<p><b>Applications can be mailed or delivered in-person to:</b>                  Soka University of America                  Attn: Office of Financial Aid                  Founders Hall, Room 216                  1 University Drive                  Aliso Viejo, CA 92656                  USA</p>	<p><b>Website:</b> <a href="http://www.soka.edu/financialaid">www.soka.edu/financialaid</a>  <b>Email:</b> <a href="mailto:financialaid@soka.edu">financialaid@soka.edu</a>  <b>Phone:</b> (949) 480-4342</p>
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For more information, please visit our website at: [www.soka.edu/financialaid](http://www.soka.edu/financialaid)

**SECTION F: 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.

(This form requires handwritten signatures. Photocopies of handwritten signatures are permitted. Electronic, or typed, signatures will not be accepted.)

\_\_\_\_\_  
 Student Name (print)

\_\_\_\_\_  
 Student Signature (hand-written signature only, see note above)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Spouse Name (if married) (print)

\_\_\_\_\_  
 Spouse Signature (optional) (hand-written signature only, see note above)

\_\_\_\_\_  
 Date