

Office of Financial Aid

Instructions for Completing the Soka International Student Financial Aid Application

This form should be completed by international non-U.S. undergraduate resident students applying to Soka University, for classes beginning in the Fall of 2022, 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, 2022**

Continuing Students: **March 2, 2022**

**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 “2020 tax period”. The United States 2020 tax period is January 1, 2020 to December 31, 2020. If you or your parents filed taxes in a country that uses a “fiscal” tax period (such as July 1, 2019 to June 30, 2020), use/submit income and tax documents for **both** the 2019-2020 and 2020-2021 fiscal years; to include **all** 2020 income.
  - **Bank, Brokerage, and Investment Account Statements.** Do not include “retirement” accounts.
  - **Investment Real Estate or Business(es) owned by you or your parents.**
  - **Grant and Scholarship Documentation**
  - **Any other miscellaneous funds earned by, or paid to, you or your parents.**
- 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.**

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 **not** accept documents that use different conversion rates.

Country	Currency	USD	Exchange Rate
Afghanistan	AFN	\$1	79.9314
Albania	ALL	\$1	105.182
Argentina	ARS	\$1	98.7697
Australia	AUD	\$1	1.3757
Bangladesh	BDT	\$1	85.6237
Bosnia and Herzegovina	BAM	\$1	168663
Brazil	BRL	\$1	5.37415
Bulgaria	BGN	\$1	1.68665
Cambodia	KHR	\$1	4096.42
Cameroon	XAF	\$1	565.679
Canada	CAD	\$1	1.26456
China	CNY	\$1	6.44713
Congo (Kinshasa)	CDF	\$1	1981.61
Denmark	DKK	\$1	6.41312
Egypt	EGP	\$1	15.72
Ethiopia	ETB	\$1	46.1991
France	EUR	\$1	0.862397
Georgia	GEL	\$1	3.13922
Germany	EUR	\$1	0.862397
Ghana	GHS	\$1	6.05418
Honduras	HNL	\$1	24.0871
India	INR	\$1	74.1679
Indonesia	IDR	\$1	14296.00
Italy	EUR	\$1	0.862397
Japan	JPY	\$1	111.017
Kenya	KES	\$1	110.527
Kyrgyzstan	KGS	\$1	84.7982
Liberia	LRD	\$1	170.903
Malawi	MWK	\$1	815.611
Malaysia	MYR	\$1	4.18072
Mexico	MXN	\$1	20.4586
Mongolia	MNT	\$1	2855.14
Morocco	MAD	\$1	9.05194

Country	Currency	USD	Exchange Rate
Myanmar	MMK	\$1	1844.95
Nepal	NPR	\$1	119.196
Netherlands	EUR	\$1	0.862397
New Zealand	NZD	\$1	1.4402
Nigeria	NGN	\$1	410.86
Pakistan	PKR	\$1	170.704
Peru	PEN	\$1	4.13064
Philippines	PHP	\$1	50.6494
Poland	PLN	\$1	3.94711
Russia	RUB	\$1	72.7305
Rwanda	RWF	\$1	997.236
Singapore	SGD	\$1	1.35498
South Africa	ZAR	\$1	14.8593
South Korea	KRW	\$1	1180.02
Spain	EUR	\$1	0.862397
Sri Lanka	LKR	\$1	199.708
Sweden	SEK	\$1	8.74562
Switzerland	CHF	\$1	0.929762
Taiwan	TWD	\$1	27.8166
Tajikistan	TJS	\$1	11.3357
Thailand	THB	\$1	33.649
Gambia	GMD	\$1	51.4943
Tunisia	TND	\$1	2.81019
Turkey	TRY	\$1	8.86347
Uganda	UGX	\$1	3551.36
Ukraine	UAH	\$1	26.6601
United Arab Emirates	AED	\$1	3.6725
United Kingdom	GBP	\$1	0.737309
Vietnam	VND	\$1	22739.6
Zambia	ZMW	\$1	16.7536
Zimbabwe	ZWD	\$1	361.9



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**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 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

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

**PART A2: PARENT INFORMATION**

**NOTE!: If you (the student) were born before January 1, 1999, or are legally married, you are an "independent" student and may skip all parental information questions on this entire form.**

The term "parent" refers to a biological parent, adoptive parent, or step-parent. If your parents are married or not married & living together, list the names of both parents, even if one is not working. If you live with one parent who has re-married, list the name of your biological parent and your step-parent. If your parents are divorced or separated, and not living in the same household, list only the parent you lived with more during the past 12 months.

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

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

**Parents' Current Marital Status**

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

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

**Dislocated Workers/Displaced Homemakers**

As of today, are either of your parents 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.)



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**PART A3: FAMILY HOUSEHOLD INFORMATION**

List the people living in your parent(s)' household. Please include:

- Yourself (even if you do not live with your parents); and your parent(s) {including a step-parent}.
  - If your parents are divorced or separated, include the parent that **lives in** the household.
- Your parent(s)' other dependent children, even if not living with your parent(s). List only family members your parent(s) provide more than half of their support for, **OR** family members that would be required to provide your parent(s)' information when applying for student aid. Do not include foster children.
- Other members; only if: (a) they live with your parent(s), **AND** (b) your parent(s) provide more than half of their support, **AND** (c) they will continue to provide support from July 1, 2022 through June 30, 2023.
- College information for any household member that: (a) will enroll in college at least half-time during the 2022-2023 academic year, **AND** (b) was born on or after January 1, 1999, **AND** (c) will be enrolled in an undergraduate degree, diploma, or certificate.

Full Name of Household Member	Relation to Student	Born on or after January 1, 1999	Information for family members born on or after January 1, 1999; who will enroll at least half-time in college during 2022-2023*		
			Name of College	Type of Degree (BA, MA, etc.)	Year in College for 2022-2023 (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 a parent or brother/sister, please explain how and why your family is financially supporting this person:**

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**SECTION B: INCOME AND TAX 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.)**

2020 Tax Return Non-Filer Information	STUDENT	PARENT 1	PARENT 2
	For each person listed, check only <b>one</b> box for either Question 1 or Question 2, but not both!		
1) Check the box for any person that <b>did not</b> earn ANY income in 2020.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Check the box for any person that <b>did</b> earn income in 2020, and <b>was not required</b> to file a 2020 tax return.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>FOR ALL PERSONS WITH BOXES CHECKED FOR QUESTION #2 ABOVE:</b>  <b>If they worked in 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.  <b>If they worked outside 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 <b>both</b> U.S. dollars and local currency amounts using the currency conversion information from the chart on <b>Page 2</b> .			

**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.

2020 Non-U.S. Tax Return Filer Information	STUDENT	PARENT 1	PARENT 2
Check the box for any person that filed a <b>non-U.S. tax return</b> for the 2020 tax year. If your home country is on a fiscal year, and not on a calendar tax year, use both the 2019-2020 and 2020-2021 tax years.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>FOR ALL PERSONS WITH BOXES CHECKED IN THE QUESTION ABOVE:</b> <ol style="list-style-type: none"> <li>Attach all original tax documents. <b>Include a signed, translated, notarized copy of 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>			



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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.

2020 U.S. IRS 1040NR Tax Filer Information			
	STUDENT	PARENT 1	PARENT 2
Check the box for any person that filed, or will file, a U.S. IRS 1040NR tax return (U.S. Non-Resident Alien Income) for the 2020 tax year.	<input type="checkbox"/>	<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.

2020 Total Income & Total Tax Assessed Information					
List the following totals for any person who earned any income in 2020 (*see NOTE below)		Home Currency	U.S. Dollars	FOR SCHOOL USE ONLY (Home/US)	
STUDENT	Total Income				
	Total Tax Assessed				
PARENT 1	Total Income				
	Total Tax Assessed				
PARENT 2	Total Income				
	Total Tax Assessed				

\* **NOTE:** 'Income' and 'Tax Assessed' figures should include the entire 12-month "2020 tax period". The United States 2020 tax period is January 1, 2020 to December 31, 2020. If you or your parents filed taxes in a country that uses a "fiscal" tax period (such as July 1, 2019 to June 30, 2020), use/submit income and tax documents for both the 2019-2020 and 2020-2021 fiscal years; to include all 2020 income.



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**PART B4: UNTAXED INCOME INFORMATION**

2020 Untaxed Additional Income Information	STUDENT	PARENT(S)
	Totals from 1/1/20 to 12/31/20 (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 or your parents 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**

2020 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 A3: 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



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**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 parents.

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 parents, as of the date of this application.

Be sure to check the appropriate box for any person who does NOT hold an account.

**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 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 SCHOOL USE ONLY (Home/US)
STUDENT	<input type="checkbox"/>				
STUDENT					
STUDENT					
STUDENT					
PARENT 1	<input type="checkbox"/>				
PARENT 1					
PARENT 1					
PARENT 1					
PARENT 2	<input type="checkbox"/>				
PARENT 2					
PARENT 2					
PARENT 2					





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**PART C2: INVESTMENT REAL ESTATE**

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

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

“Investment Real Estate” includes: Real estate other than your primary residence, rental properties, 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"/> Parent
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"/> Parent
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 or your parents.

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"/> Parent	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	



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**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 2022-2023 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.

2022-2023 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	\$5,000
	<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	

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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 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 we may still request that you submit original documents.

Table with 2 columns: Application location (Soka University of America, Founders Hall, Room 216, 1 University Drive, Aliso Viejo, CA 92656, USA) and Contact information (Website: www.soka.edu/financialaid, Email: financialaid@soka.edu, Phone: (949) 480-4342).

For more information, please visit our website at: 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. (If you were born before January 1, 1999; your parents do not need to sign this form.)

(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

Parent Name (print) Parent Signature (hand-written signature only, see note above) Date