



BUCKNELL UNIVERSITY
FINANCIAL AID DATA FORM

Return to
Bucknell
University

OFFICE OF FINANCIAL AID
621 St. George St.
Lewisburg, PA 17837
570-577-1331
Fax: 570-577-1481
finaid@bucknell.edu

Academic Year 2021-2022

APPLICATION DEADLINE:

RETURNING STUDENTS DEADLINE: MARCH 15, 2021

Name: Last First Middle

Bucknell ID #: Anticipated College Graduation Date: (month) (year)

Please list any siblings who will be enrolled at Bucknell in 2021-2022:

LIST OUTSIDE AID:

List any outside education-related funding you anticipate for 2021-2022 from all sources other than Bucknell, including outside grants/scholarships, Employee Tuition Benefits, VA Benefits, and any other funding for education expenses. (Do NOT include Bucknell or federal/state aid.)

\$ Source
\$ Source

FEDERAL TAX RETURNS AND W-2 FORMS:

- 1. Did the parent(s) work in 2019? YES NO
2. Did the parents(s) file a federal tax return in 2019? YES NO

If yes, please submit to our office:

1. Parent(s) 2019 Federal Tax Return.

- i. The FEDERAL return with schedules is all we need. Please do NOT submit state or local tax returns.
ii. Please make sure the tax return is signed and dated. Please include schedules 1, 2, 3, C, SE, and K1, if applicable.

2. Parent(s) 2019 W-2 forms

UNTAXED INCOME:

Table with 3 columns: Source of Untaxed Income Received, Parent(s) 2019 Amount Received, Student 2019 Amount Received. Rows include Child Support Received, Social Security Income, Housing allowances, Veterans benefits, Alimony, and Other untaxed income.

**FEDERAL STUDENT LOAN INFORMATION FOR YOU TO REVIEW AND UNDERSTAND:**

Maximum annual loan limits are \$5,500 first-years, \$6,500 sophomores, \$7,500 juniors and \$7,500 for seniors. Of these, the subsidized maximums are \$3,500, \$4,500, \$5,500, and \$5,500, respectively. Eligibility is determined by financial need, credits earned and loan program rules. Federal Direct Loan amounts can change upon further review of eligibility, generally resulting in funds being reallocated between subsidized and unsubsidized loans. We will notify you if your initial loan eligibility should change.

In order to accept the Federal Direct Loan amount(s) you would like to borrow for the 2021-22 academic year, we will have a new online process in myBucknell beginning in mid-June of 2021. After you have completed your initial online loan acceptance, please know that you will need to email us at [finaid@bucknell.edu](mailto:finaid@bucknell.edu) for subsequent loan changes such as increasing or decreasing loan amounts.

**SIGNATURES/CERTIFICATION:** *The student and at least one parent must sign below, certifying that all information reported on this form is correct and that they will inform Bucknell's Office of Financial Aid as soon as possible if changes occur.*

We understand if the student is selected for a named endowed or annual fund, a portion of the Bucknell aid will be funded from the named endowed or annual account, but additional aid will **not** result. We also give consent for Bucknell to disclose the student's name, intended major and activities to the donor of the named endowed or annual fund for stewardship purposes.

We understand that if we do not complete all financial aid requirements until after the deadline, or if our family's income increases or number of children in college (enrolled at least half-time in first undergraduate degree-seeking programs) decreases, then the Bucknell Need-Based Grant will also decrease. We understand that Bucknell may withhold or cancel financial aid if we do not provide any required and/or requested information.

We understand that total gift aid at Bucknell cannot exceed the published comprehensive fee (tuition, student activity fee, room, board) plus \$1,500 (\$750 per semester.) If this total is reached, Bucknell aid (need-based and/or merit-based) will be decreased dollar for dollar to prevent an overaward. In addition, other situations may include, but are not limited to: If you receive aid from an outside agency in addition to our Bucknell Community College Scholarship, Posse Scholarship, or athletic aid at the level of tuition, please know that we may have to split your Bucknell aid unevenly for fall and spring to prevent an overaward for a semester or the academic year. If funds from an outside agency would result in your total aid exceeding our maximum, please know that Bucknell aid (and possibly other aid) will need to be adjusted to prevent an overaward. Typically, we will split outside funds evenly between fall and spring semesters. However, if an outside agency stipulates their total amount is to be applied in the fall semester, we will apply the entire amount in the fall and adjust your financial aid package accordingly to prevent an overaward. Our goal is to maximize aid for students as much as possible while adhering to our gift aid policy as well as federal and state financial aid regulations.

We give Bucknell's Office of Financial Aid permission to correct our FAFSA based on tax return, W-2, data/verification forms and other information or documents that we have provided. We understand the information on our financial aid documents may be shared with the applicant and agencies from which we are requesting aid.

We give our permission for Bucknell's Office of Financial Aid to communicate with us electronically via the student's myBucknell email account and/or parent(s) email addresses.

We understand that financial aid is to be used only for the student's education-related expenses such as tuition, room, board, books, supplies and general living costs. Federal financial aid regulations stipulate that the total aid package cannot exceed the total cost of attendance as established by the Bucknell's Office of Financial Aid.

We understand that enrollment at Bucknell University constitutes a contractual financial obligation to pay tuition and any fees for classes in which the student is enrolled, and that the student's financial obligations are required by the due date set by Bucknell Bursar Services each semester.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent preferred E-mail address

\_\_\_\_\_  
Parent Daytime Phone Number

**Bucknell's Office of Financial Aid will contact the student via Bucknell email and/or through myBucknell if we need any additional information.**