

The Texas Application for State Financial Aid (TASFA) is a **free** application that collects information to help determine eligibility for state (or institutional) financial aid programs administered by institutions of higher education in the state of Texas.

Students classified as Texas residents who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. To review the FAFSA filing requirements, visit studentaid.gov or contact the financial aid office at the institution you plan to attend for the 2024-25 award year. The federal application covers federal and state financial aid opportunities. If you meet the FAFSA filing requirements, then you should submit a completed FAFSA.

DO NOT COMPLETE BOTH THE FAFSA AND TASFA.

The 2024-25 state financial aid priority application deadline for many institutions of higher education is **April 15, 2024**. It is important to complete and submit this application with all required documentation to the financial aid office **on or before April 15** to be considered for the most financial aid possible.

To complete this application, answer each item within each applicable section. If a question does not apply to you, answer N/A for *not applicable*. For clarification on certain items, refer to the **TASFA Notes on pages 7-12**. If you have further questions about this form, contact the financial aid office at your institution. More information on the TASFA can be found at www.highered.texas.gov/our-work/empowering-our-students/tasfa/.

Note: Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION 1: STUDENT INFORMATION

DEMOGRAPHICS

1. Last Name		2. First Name		3. Middle Initial	
4. Date of Birth		5. What is your Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ [] N/A			
6. Your permanent mailing address number and street (include apt. number)					
7. City		8. State		9. ZIP Code	
10. Phone Number					
11. Your Email Address					

EDUCATION DETAILS

12. What will your high school (HS) completion status be when you begin college in the 2024-25 school year?		[] High School Diploma		[] Homeschooled (Skip to question 14)	
		[] High School Equivalency Certificate (i.e., GED, HiSET, etc.) (Skip to questions 13c & 13d)		[] None of these (Skip to question 14)	
13a. High School Name (If applicable)					
13b. High School City (If applicable)		13c. HS State (If applicable)		13d. HS ZIP code (If applicable)	
14. Will you have your first bachelor's degree before you begin the 2024-25 school year? [] Yes [] No					

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

An individual born male must complete the Selective Service Statement of Registration Status below, in accordance with [Texas Education Code, Title 3, Section 51.9095](#). For more information on Selective Service registration, visit sss.gov.

15. Were you born male or female? [] Male [] Female

16. Please mark one option below:

___ I was born female and not required to register.

___ I was born male and am under the age of 18, and not currently required to register.

___ I was born male and am **REGISTERED** with the Selective Service.

___ I was born male and am over age 18. I am not registered with the Selective Service, and I am not exempt.

___ I was born male and am **EXEMPT** from registration because:
(please briefly explain why you are exempt in the box below.)

STUDENT MARITAL STATUS

17. What is your marital status as of today? <input type="checkbox"/> Single (<i>never married</i>) <input type="checkbox"/> Separated <input type="checkbox"/> Married (<i>not separated</i>) <input type="checkbox"/> Divorced <input type="checkbox"/> Remarried <input type="checkbox"/> Widowed	18. Month and year you were married, remarried, separated, divorced, or widowed. Month: _____ Year: _____ <input type="checkbox"/> N/A
19. Spouse's Last Name _____ <input type="checkbox"/> N/A	20. Spouse's First Name _____ <input type="checkbox"/> N/A
21. What is your spouse's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? _____ <input type="checkbox"/> N/A	

STUDENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. See *Notes for questions 22-29*.

22. How much did you earn from working in 2022? _____ <input type="checkbox"/> N/A	23. How much did your spouse earn from working in 2022? _____ <input type="checkbox"/> N/A
24. For 2022, have you completed your IRS income tax return or another tax return? <input type="checkbox"/> Already completed <input type="checkbox"/> Will file <input type="checkbox"/> Not going to file (<i>Skip to question 30</i>)	25. What income tax return did you file or will file for 2022? <input type="checkbox"/> IRS 1040 <input type="checkbox"/> Foreign tax return, IRS 1040NR or IRS 1040NR-EZ <input type="checkbox"/> Tax return from Puerto Rico, a U.S. territory, or Freely Associated State
26. What is or will be your tax filing status for 2022? <input type="checkbox"/> Single <input type="checkbox"/> Head of Household <input type="checkbox"/> Married filing jointly <input type="checkbox"/> Married filing separately <input type="checkbox"/> Qualifying surviving spouse	27. Did (or will) you file a Schedule A, B, D, E, F or H with your 2022 tax return? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
28. What was your (and spouse's) adjusted gross income for 2022? Adjusted gross income is on IRS Form 1040—line 11. _____	29. Enter your (and spouse's) income tax paid for 2022 from 1040—line 22 minus Schedule 2—line 2. If negative, enter zero. _____

DO NOT LEAVE ANY BLANKS. If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for you (and your spouse if applicable). See *Notes for questions 30-43*.

STUDENT ASSETS

30. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i>	
31. As of today, what is the net worth of your (and spouse's) investments, including real estate? <i>Don't include the home you live in. Net worth is the value of the investments minus any debts owed against them.</i>	
32. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? <i>Enter the net worth of the student's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i>	
33. Child support received for any of your children. Don't include foster care or adoption payments.	

STUDENT 2022 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME

34. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.	
35. Taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	
36. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
37. Tax exempt interest income from IRS Form 1040—line 2a.	
38. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b.	

39. IRA rollover into another IRA or qualified plan.	
40. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
41. Pension rollover into an IRA or other qualified plan.	
42. Net profit or loss from IRS Form 1040— line 31 of Schedule C.	
43. Foreign earned income exclusion from IRS Form 1040— line 8d of Schedule 1.	

SECTION 2: STUDENT STATUS DETERMINATION

Answer all questions. See Notes for questions 44-56.

44. Were you born before January 1, 2001?	[] Yes [] No
45. As of today, are you married?	[] Yes [] No
46. At the beginning of the 2024-2025 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?	[] Yes [] No
47. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	[] Yes [] No
48. Are you a veteran of the U.S. Armed Forces?	[] Yes [] No
49. Do you have children who will receive more than half of their support from you between July 1, 2024 and June 30, 2025?	[] Yes [] No
50. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2025?	[] Yes [] No
51. At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?	[] Yes [] No
52. As determined by a court in your state of residence, are you or were you an emancipated minor?	[] Yes [] No
53. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?	[] Yes [] No
54. At any time on or after July 1, 2023, did your high school, school district homeless liaison/designee, or financial aid administrator determine that you were an unaccompanied youth who was homeless?	[] Yes [] No
55. At any time on or after July 1, 2023, did the director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness, determine that you were an unaccompanied youth who was homeless.	[] Yes [] No
56. At any time on or after July 1, 2023, did the director or designee of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	[] Yes [] No

state. The court must be located in your state of legal residence at the time the court's decision was made.

Answer "No" if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult.

Note: The financial aid administrator at your school may require you to provide additional information such as a copy of the court's decision.

Notes for questions 54-56 (page 3)

Answer "Yes" if you received a determination at any time on or after July 1, 2023, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- "Homeless" means lacking fixed, regular, and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live.
- "Unaccompanied" means you are not living in the physical custody of your parent or guardian.

Answer "No" if you are not homeless or at risk of being homeless, or do not have a determination. However, even if you answer "No," you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses, as your college financial aid office can determine that you are "homeless" and are not required to provide parental information.

The financial aid administrator at your college may require you to provide a copy of the determination if you answered "Yes" to any of these questions.

SECTION THREE: PARENT INFORMATION

Notes for questions 57-94 (pages 4-5)

If you answer no to all of the student status questions in Section 2, then **you will need** parental information and for your parent to sign your application.

Legal parents are biological or adoptive (regardless of gender), or as determined by the state (for example, if the parent is listed on the birth certificate). Grandparents, foster parents, legal guardians, widowed stepparents, aunts, uncles, and siblings are not considered parents on this form unless they have legally adopted the student.

Note: If you believe you have a special circumstance in which you are unable to enter parental information when completing the TASFA, it is important for you to notify and work closely with the financial aid office of the institution you plan to attend. In limited circumstances such as the ones listed below, you may be able to submit your TASFA without providing parental information:

- you have left home due to an abusive or threatening family environment;
- you were abandoned by or estranged from your parents;
- you have refugee or asylee status and are separated from your parents, or your parents are displaced in a foreign country;
- you are a victim of human trafficking;
- you are incarcerated, or your parents are incarcerated, and contact with the parents would pose a risk to you; or
- Are otherwise unable to contact or locate their parents.

In these special circumstances, it is important for you to understand

the following: The financial aid staff may ask for additional information to determine whether you can have a student aid index (SAI) calculated without parental data.

Notes for question 57 (page 4)

Report your legal parents' marital status as of the date you sign your TASFA (enter married if they are separated but not divorced).

- If your parent was never married and does not live with your other legal parent, or if your parent is widowed and not remarried, answer the questions about that parent.
- If your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]) are not married to each other and live together, select "Unmarried and both legal parents living together" and provide information about both of them, regardless of their gender. Do not include any person who is not married to your parent and who is not a legal or biological parent.
- If your legal parents are married, select "Married" or "Remarried." If your legal parents are divorced but living together, select "Unmarried and both legal parents living together." If your legal parents are separated but living together, select "Married" or "Remarried," not "Divorced" or "Separated."
- If your parents are divorced or separated, answer the questions about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent. If both parents provided an exactly equal amount of financial support during the past 12 months, or if they don't support the student financially, answer the questions about the parent with the greater income and assets. If this parent is remarried as of today, answer the questions about that parent and your stepparent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your stepparent.

Notes for questions 62 and 69 (page 4)

If your parent has been issued a social security card, enter their assigned number. If your parent has been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned social security number (SSN) through this program. If your parent has an Individual Taxpayer Identification Number (ITIN), enter it.

Notes for question 64 and 71 (page 4)

The email provided for your parent is very important that it be a regularly reviewed email account. Please make sure that the email is accurate.

Notes for questions 65 and 72 (page 4)

Select the answer that best describes the highest level of education completed by your parent. Some financial aid is offered based on the level of schooling your parents completed.

Notes for questions 73 and 74 (page 4)

Enter Parent 1 and Parent 2 (if applicable) 2022 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on Parent 1's tax return: IRS form 1040(or 1040-NR): Line 1z + Schedule 1: lines 3 + 6.

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

Notes for question 75 (page 4)

If your parents are now married or living together, answer this question about them as a couple. If they are not married and not living together, answer this question about the parent who is

reporting financial information on this application.

If you indicate Parent "Will file" a 2022 tax return and your 2022 income is similar to your 2021 income, use your 2021 income tax return to provide estimates for questions about your income.

If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

Notes for question 76 (page 4)

If your parent filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If your parent filed a foreign return, convert all monetary units to U.S. dollars, using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to [federalreserve.gov/releases/h10/current](https://www.federalreserve.gov/releases/h10/current).

Notes for question 77 (page 4)

If a parent filed or will file an IRS Form 1040 tax return, you must select the tax return filing status for 2022 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

The "Filing Status" field is located at the top of page one on IRS Form 1040.

Notes for question 79 (page 4)

If your parents filed a 2022 tax return, the AGI can be found on IRS Form 1040—Line 11.

If your parents filed separate tax returns, calculate the total AGI by adding line 11 from both 2022 tax returns and entering the total amount.

If your parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

If one parent filed a tax return and the other didn't and won't file, add line 11 from the 2022 IRS Form 1040 to your other parent's 2022 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 80 (page 4)

This question cannot be left blank if your parents filed or will file a 2022 income tax return.

Income tax paid can be found on your 2022 IRS Form 1040—line 22 minus Schedule 2—line 2. If negative, enter a zero.

Note: The line numbers above are from the Internal Revenue Service tax form, not from the W-2 form.

Notes for question 81 (page 5)

Add the account balances of your parents' cash, savings, and checking accounts as of today. If the total is negative, enter zero as the total current balance. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 82 (page 5)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms minus debts related to those same investments, businesses, and/or investment farms. When

calculating net worth, use 0 for investments or properties with a negative value.

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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 (including mortgages held), commodities, etc.

Investments also include qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, the value of life insurance, ABLE accounts, retirement plans (401[k] plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings, and checking accounts already reported.

Investments also do not include UGMA and UTMA accounts for which you are the custodian but not the owner.

Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

Notes for question 83 (page 5)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that your parents own as of today.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

Notes for question 84 (page 5)

Enter the total amount of child support your parents received in 2022 for all children in your household.

- If they received the same dollar amount every month, multiply the amount by the number of months they received it. The result is the total annual amount.
- If they did not receive the same amount each month, add together the amounts they received each month. The result is the total annual amount.

Note: Do not include foster care or adoption payments.

