

Understanding the FAFSA

An Upward Bound Guide to Accessing Federal, State, & Institutional Financial Aid



What is the FAFSA?



The **Free Application for Federal Student Aid (FAFSA)** is the key form used to apply for financial assistance—such as grants, work-study, and student loans. It's also used by many states and colleges/universities to determine eligibility for institutional aid.

Why is it Important?



- Applies for the **Pell Grant**—which can be up to \$7,395 per year!
- Required by most institutions for awarding other federal or state-based financial aid.
- Helps colleges understand your financial need and offer a full financial aid package.



Who Needs to Submit It?

- High school seniors, current college students, or anyone thinking about enrolling in higher education.
- Even if you think your family makes too much, you should still submit the FAFSA!
- If you're a transfer student, add your new institution's FAFSA code to your existing application.



How can I prepare for it?

- Social Security Number, driver's license (if applicable), and birthdate.
- Federal school codes for the institutions you want your FAFSA sent to for processing.
- Parent information, such as their personal email address.
- Records of untaxed income, bank statements, and investment information.



When should I submit it?

A new FAFSA opens every October 1st and you must complete a new application every year:

- 2025-2026 = Fall '25, Spring '26, Summer '26 semesters
- 2026-2027 = Fall '26, Spring '27, Summer '27 semesters
- 2027-2028 = Fall '27, Spring '28, Summer '28 semesters

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The FAFSA is Free!

- There is no cost to submit a FAFSA.
- Avoid websites or companies who charge you for FAFSA assistance.

Application Steps



Visit studentaid.gov



Create or sign-in with your Federal Student Aid (FSA) ID



Start the FAFSA and enter student, parent, & financial information



Add up to 20 colleges, universities, or technical schools



Submit your application and ensure your parent completes their section as soon as possible

Need help with your FAFSA? | Our TRiO UB staff are here to support you, so don't hesitate to reach out!



Scan this QR code to begin your FAFSA journey!



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Understanding the CSS Profile

An Upward Bound Guide to
Unlocking Non-federal Financial Aid



What is CSS Profile?

The **CSS Profile** (College Scholarship Service Profile) is an **online application** from the **College Board** used by about **400 colleges and scholarship programs** to award **non-federal financial aid**, like school-based grants and scholarships.



Why is it Important?

- Required by many private and selective colleges.
- Helps schools understand your complete financial picture.
- Can open the door to additional financial aid beyond what the FAFSA offers.



Who Needs to Submit It?

- Not all colleges require the CSS Profile—**check with each institution** you're applying for admission.
- Divorced or separated parents** may also need to submit applications.



How can I prepare for it?

- Identify student / parent income, tax returns, and W-2s.
- Determine family size and number in college.
- Locate bank statements and other financial records.
- Notate non-custodial parent info (if applicable).



When do I submit it?

- Most students complete the CSS Profile in their **senior year** of high school starting on **October 1st**.
- Some schools may have different deadlines, though.

Need help with the CSS Profile? | Our TRIO UB staff is here to support you, don't hesitate to reach out!



Scan QR to see Participating Institutions and Programs

Certain colleges, universities, and scholarship programs use CSS Profile & Institutional Documentation of Service (IDOC) as part of their financial aid process for some or all applicants.

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