

FEDERAL STUDENT LOAN QUESTIONNAIRE

BORROWER INFO

Name: _____
(First, Middle, Last)

Former Names (if any):

(First, Middle, Last)

(First, Middle, Last)

(First, Middle, Last)

Street Address: _____

City: _____ State: _____ Zip: _____

Date of Birth: _____ Social Security Number (SSN): _____

Driver's License State: _____ Driver's License Number: _____

Home Phone: (_____) _____ Cell Phone: (_____) _____

Work Phone: (_____) _____

Email: _____

FAMILY INFO

Marital Status:

- Single Married Married, but separated Married, but cannot access spouse's income info

If Married, provide the following:

Spouse Name: _____

Spouse Date of Birth: _____

Spouse Social Security Number (SSN): _____

Does Spouse have Federal Student Loans too?: Yes No

People Receiving Support from Borrower:

How many children receive more than half of their support from Borrower? _____

How many other people receive more than half of their support from Borrower? _____
(Do **NOT** include spouse)

NOTE: Family and IRS dependent status are NOT relevant. The only relevant factor is if child or person receives more than 50% of their support from Borrower

EMPLOYMENT INFO

Employer Name: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Borrower is not employed

INCOME INFO

INSTRUCTIONS: If annual taxable income has not changed significantly since last tax return, enter the Adjusted Gross Amount (AGI) from borrower's last tax return.

Married borrowers filing jointly – enter household AGI

Married borrowers filing separately - must provide spouse's annual taxable income too

Current Annual Taxable Income : \$ _____

Did taxable income change significantly from last year? Yes No

Married borrowers, filing separately ONLY

Spouse's Current Annual Taxable Income: \$ _____

Did taxable income change significantly from last year? Yes No

REFERENCES

REFERENCE #1

Name: _____

(First, Middle, Last)

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: (_____) _____ Email: _____

Relationship to Borrower: _____

REFERENCE #2

Name: _____

(First, Middle, Last)

Street Address: _____

City: _____ State: _____ Zip: _____

Phone: (_____) _____ Email: _____

Relationship to Borrower: _____

COLLECTION ACTIVITY

Is Borrower in active bankruptcy? Yes No

If yes, provide the following:

Bankruptcy Jurisdiction: _____

Filing Date: _____

Case Number: _____

Bankruptcy Chapter: 7 11 12 13

NOTE: Borrower should have bankruptcy court's permission to make changes to borrower's student loans. If not, the bankruptcy could be dismissed.

Are Borrower's wages being garnished? Yes No

NOTE: If borrower's wages are being garnished, borrower must first resolve the wage garnishment with the debt collector before proceeding. (Bankruptcy automatically stays the wage garnishment).

Are Borrower's Federal student loans subject to a lawsuit or judgment? Yes No

NOTE: if borrower's student loan lender is suing borrower or has obtained a judgment, borrower must first resolve the lawsuit/judgment before proceeding.

ADDITIONAL MATTERS

Servicer Selection:

Borrower may be able to select their loan servicer. Select from the list below:

- Nelnet Navient FedLoan Servicing CornerStone OSLA Servicing
 Great Lake MOHELA HESC/EdFinancial Granite State I don't care

NSLDS Data:

Borrower will need to provide their Federal student loan information from the National Students Loan Data System (NSLDS). This can be done one of two ways:

Option 1

Provide borrower's NSLDS text file (see attached instructions)

OR

Option 2

Provide borrower's FSA ID and Password

Borrower's FSA ID: _____

FSA Password: _____

IMPORTANT: borrower will NOT be able to proceed without borrower's NSLDS data.

SPECIAL INSTRUCTIONS FOR TEACHERS

Teachers may be eligible for special loan forgiveness programs. If borrower is (or was) a teacher, answer the questions below:

Is borrower currently (or has borrower been) a full-time teacher?

Yes No

Has borrower taught full-time for at least five (5) consecutive, complete academic years (with at least one of those years being AFTER the 1997-98 academic year)?

Yes No

Was/is borrower's teaching service performed at an eligible school listed on the Teacher Cancellation Loan Income List? (list may be found online at <https://studentloans.gov/myDirectLoan/tcliDirectorySearch.action>).

Yes No

Were any federal student loans originated before the end of borrower's 5-year teaching service?

Yes No

SPECIAL INSTRUCTIONS FOR GOVERNMENT AND NON-PROFIT EMPLOYEES

Employees working in the public and non-profit sectors may be eligible for special loan forgiveness programs. If borrower works in the public or non-profit sectors, answer the questions below:

Is borrower's employer a governmental organization?

Yes No

Is borrower's employer tax-exempt under Section 501(c)(3) of the Internal Revenue Code?

Yes No

Is borrower's employer a not-for-profit organization?

Yes No

Is borrower's employer a partisan political organization?

Yes No

Is borrower's employer a labor union?

Yes No

Indicate the service(s) borrower's employer provides:

- | | |
|---|---|
| <input type="checkbox"/> Emergency management | <input type="checkbox"/> Public Service For The Elderly |
| <input type="checkbox"/> Military Service | <input type="checkbox"/> Public Health |
| <input type="checkbox"/> Public Safety | <input type="checkbox"/> Public Education |
| <input type="checkbox"/> Law Enforcement | <input type="checkbox"/> Public Library Services |
| <input type="checkbox"/> Public Interest Legal Services | <input type="checkbox"/> School Library Services |
| <input type="checkbox"/> Early Childhood Education | <input type="checkbox"/> Other School Based Services |
| <input type="checkbox"/> Public Service For Individuals With Disabilities | <input type="checkbox"/> None Of The Above |

SPECIAL INSTRUCTIONS REGARDING LOAN DISCHARGES

Borrowers may not have to repay their federal student loans if they are unable to work (i.e., death or disability), are a victim of fraud, or the school closed while the borrower was attending.

If you think this may apply, borrower should review, complete and submit the respective Discharge application. Discharges available include:

Closed School Discharge

If borrower attended a school that closed while enrolled or if borrower withdrew 120 days before the school's closure.

Total and Permanent Disability Discharge

If borrower is totally and permanently disabled which may be shown in one of three ways:

1. Documentation from the U.S. Department of Veterans Affairs (VA) showing that the VA has determined that borrower is unemployable due to a service-connected disability.
2. A Social Security Administration (SSA) notice of award for SSDI or SSI benefits stating that borrower's next scheduled disability review will be within five to seven years from the date of borrower's most recent SSA disability determination.
3. Certification from a physician that you are totally and permanently disabled.

False Certification - Disqualifying Status Discharge

When the school certified borrower's eligibility, but because

of a physical or mental condition, age, criminal record, or other reason borrower is disqualified from employment in the occupation in which borrower was being trained.

False Certification - Unauthorized Signature Discharge

The school signed borrower's name on the application or promissory note without authorization or the school endorsed borrower's loan check or signed borrower's authorization for electronic funds transfer without borrower's knowledge. NOT if the proceeds of the loan were delivered to borrower or applied to charges owed by borrower to the school.

False Certification of Ability to Benefit Discharge

If borrower didn't have a high school diploma or GED when borrower enrolled and don't think the school properly assessed or certified borrower's ability to benefit from the education paid for with the loan.

Borrower Defense to Repayment

The school, through an act or omission, violated state law directly related to borrower's federal student loan or to the educational services for which the loan was provided.

Unpaid Refund Discharge

Borrower withdrew from school, but the school didn't pay a refund that it owed to the U.S. Department of Education or to the lender, as appropriate. Only the amount of the unpaid refund will be discharged.

Discharge Due to Death

If borrower has died.



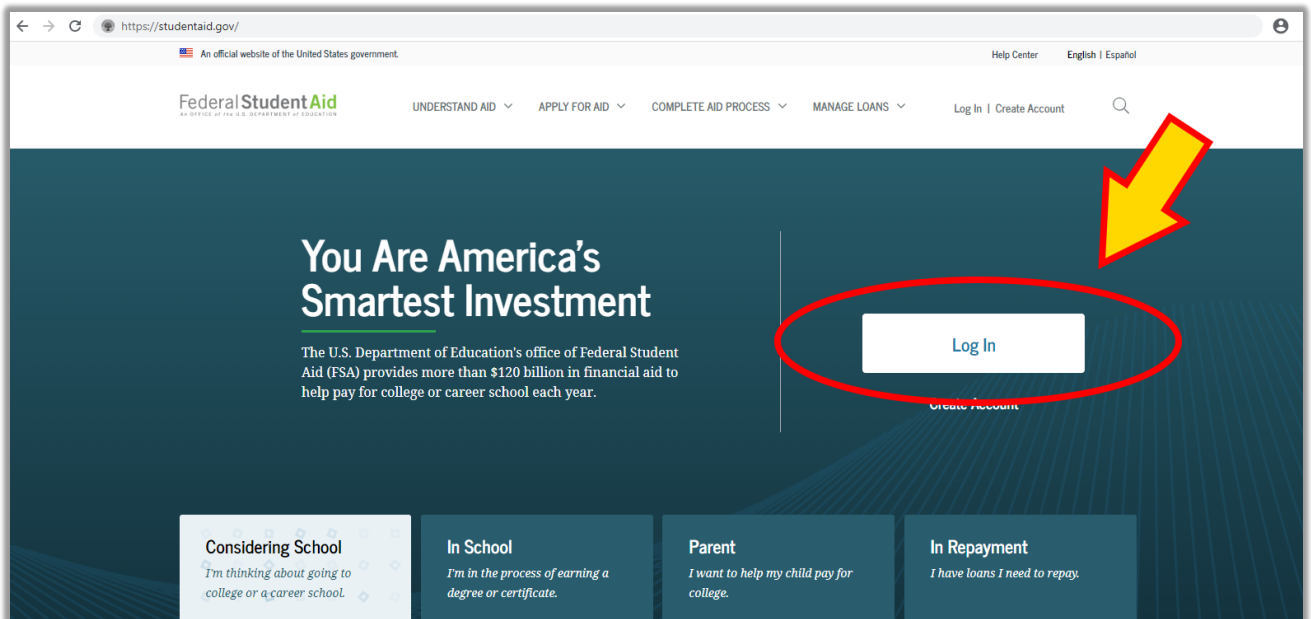
Downloading Your NSLDS File

Step 1:

Navigate your web browser to <https://studentaid.gov/>.

Step 2:

On the Federal Student Aid homepage, click the **Log In** button.



Step 3:

Enter your FSA ID and Password and click **Log In**.



Step 4:

Read the Warning and click **Accept**.

Close ✕

Warning

You are accessing a U.S. Federal Government computer system intended to be solely accessed by individual users expressly authorized to access the system by the U.S. Department of Education. Usage may be monitored, recorded, and/or subject to audit. For security purposes and in order to ensure that the system remains available to all expressly authorized users, the U.S. Department of Education monitors the system to identify unauthorized users. Anyone using this system expressly consents to such monitoring and recording. Unauthorized use of this information system is prohibited and subject to criminal and civil penalties. Except as expressly authorized by the U.S. Department of Education, unauthorized attempts to access, obtain, upload, modify, change, and/or delete information on this system are strictly prohibited and are subject to criminal prosecution under 18 U.S.C. § 1030, and other applicable statutes, which may result in fines and imprisonment. For purposes of this system, unauthorized access includes, but is not limited to:

- any access by an employee or agent of a commercial entity, or other third party, who is not the individual user, for purposes of commercial advantage or private financial gain (regardless of whether the commercial entity or third party is providing a service to an authorized user of the system); and
- any access in furtherance of any criminal or tortious act in violation of the Constitution or laws of the United States or any State.

If system monitoring reveals information indicating possible criminal activity, such evidence may be provided to law enforcement personnel.

[Decline](#) [Accept](#)

Step 5:


On the Student Aid Dashboard, click **View Details**.

Federal Student Aid
AN OFFICE OF THE U.S. DEPARTMENT OF EDUCATION

UNDERSTAND AID ▾ APPLY FOR AID ▾ COMPLETE AID PROCESS ▾ MANAGE LOANS ▾

🔔 Zen G. ▾ 🔍

MY AID

 Your loan balance is
\$221,337

[VIEW DETAILS >](#)

Loan information as of
[View loan servicer details](#)

MY CHECKLISTS

I'M PREPARING FOR SCHOOL	✓
I'M IN SCHOOL	✓
I'M IN REPAYMENT	✓
I'M A PARENT	✓

Estimate monthly payments and compare loan repayment plans
[LOAN SIMULATOR >](#)

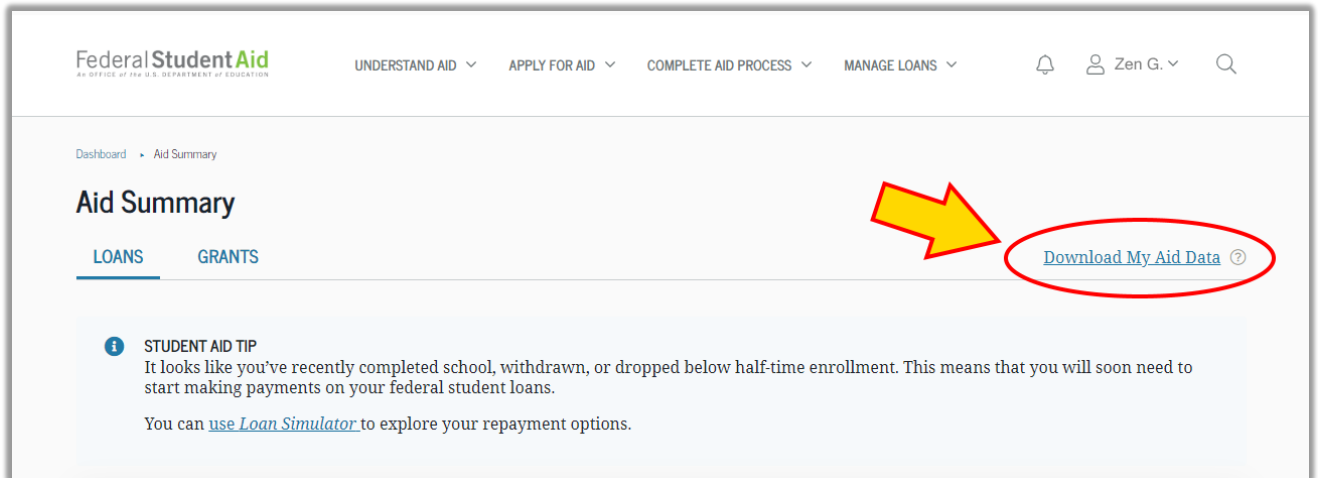
Decide whether a Direct Consolidation Loan is right for you
[LOAN CONSOLIDATION >](#)

Use the *Public Service Loan Forgiveness (PSLF) Help Tool*
[PSLF HELP TOOL >](#)



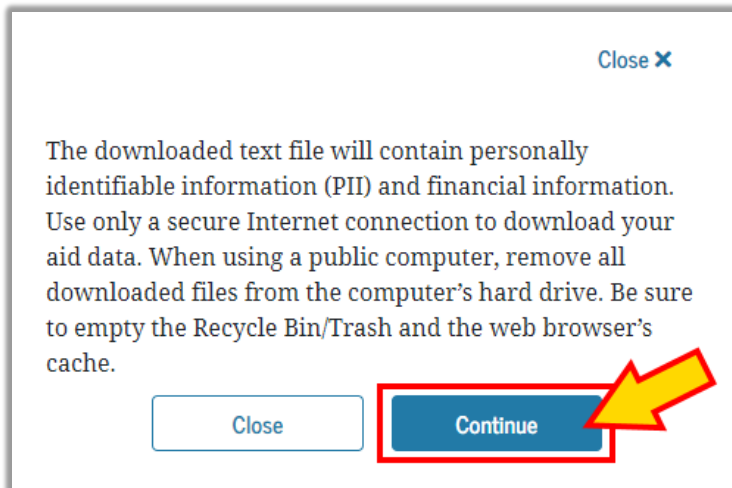
Step 6:

The Borrower Loan Details page is displayed. Click **Download My Aid Data** to download the **NSLDS.txt** file.



Step 7:

Read the displayed information and click **Continue**.



Step 8:

Clicking the **Continue** button will download your **NSLDS.txt** file to your computer.

NOTE: Your internet browser and computer settings will determine where the file is saved.

Please take note of where the file was saved.

You will need to return to the site to upload the file.

TIP: The fastest way to view your recent downloads on Internet Explorer, Firefox and Chrome is to press **CTRL+J**

