

getting started!

financing or re-financing? here's what you'll need

for in-school loans

Personal Information

- *Name
- *Address and mailing address
- *DOB
- *SSN
- *Driver's License (if applicable)
- *Citizenship status (U.S. Citizen or Permanent Resident)
- *One reference (can include a family member)
 - *Reference address
 - *Reference phone number

Student Information

†

- *School State
- *School Name
- School Branch (if applicable)
- Current year (freshman, sophomore, junior, senior)
- Academic period you are requesting the loan for (either just the fall semester or the fall and spring semesters)
- Major
- Anticipated Graduation Date (Year and month)
- Estimate financial aid

Housing Information

- *Housing Status (own, rent, other)
- *Monthly housing costs (mortgage or rent)
 - *Escrow amount included in monthly payment (if applicable)

Income Information

- *Employment status (Salaried/hourly, retired, unemployed, self-employed)
 - If you select salary/hourly, you will need to provide documentation of income (a paystub) dated within the last 30 days.
 - If you select self-employed, you will need to provide a completed and signed copy of the most recent year of federal personal income tax returns with all applicable schedules.
- *Occupation
- *Employer Name
- *Employer Address
- *Employer Phone Number
- *Total Gross Annual Income
- Any additional income information that you would like to include while being considered for a loan (Separate maintenance income, alimony, or child support does not need to be included).

Note: Any item with a * next to it applies to both the borrower and the cosigner. Any item without an * next to it applies only to the borrower.

for re-financing loans

Personal Information

- *Name
- *Address and mailing address
- *DOB
- *SSN
- *Driver's License (if applicable)
- *Citizenship status (U.S. Citizen or Permanent Resident)
- *One Reference (can include a family member)
 - *Reference address
 - *Reference phone number

Housing Information

- *Housing Status (own, rent, other)
- *Monthly housing costs (mortgage or rent)
 - *Escrow amount included in monthly payment (if applicable)

School Information

- School State
- School Name

Income Information

- *Employment status (Salaried/hourly, retired, unemployed, self-employed)
 - *If you select salary/hourly, you will need to provide documentation of income (a paystub) dated within the last 30 days.
 - *If you select self-employed, you will need to provide a completed and signed copy of the most recent year of federal personal income tax returns with all applicable schedules.
- *Occupation
- *Employer Name
- *Employer Address
- *Employer Phone Number
- *Total Gross Annual Income

*Any additional income information that you would like to include while being considered for a loan (Separate maintenance income, alimony, or child support does not need to be included).

Information About Loans to be Refinanced

- Loan type (Federal, Federal Plus-Parent, Private)
- Lender
- Servicer
- Servicer account number
- Loan number
- Current loan balance
- Current interest rate
- School state
- School name

Note: You can find all this information on any payoff documents that you have received throughout the lifetime of your loan so far. If you have any questions regarding where to find any of the above information, please Campus Door at 717.249.8800.