



SAMPLE SCHOLARSHIP INQUIRY LETTER

This letter provides a sample format for inquiring about private student aid funds. Of course, you must first identify foundations and organizations which offer such assistance well in advance of any application deadlines. You can get help finding the names and addresses of private aid sources by conducting a scholarship search on the Internet or from a reference librarian in your public library or local school. Once you have obtained contact information you will need to customize this letter to reflect your own background and needs by replacing the bracketed bold text below.

[Your Street Address]
[Your City, State and Zip]
[Date]

[Ms. Susan B. A. Dollar]
[Director of Big Money Awards]
[Lots of Money Organization]
[P.O. Box 9999]
[Moneytown, USA 99999-9999]

Dear Ms. Dollar:

I am writing to inquire about any student financial assistance that the **[Lots of Money Organization]** may offer to college-bound students.

[Enter a concise paragraph about your background and goals. Try to show how you meet the requirements of the organization's financial assistance program(s). If this is a letter to find out if the organization offers aid, write a short paragraph about how your background and ambitions coincide with the mission of the organization and might qualify you for assistance that may be offered.]

I would greatly appreciate information about any student financial assistance available through your organization, including how I may apply for this assistance. Information about application forms and deadlines for the **[20XX-XX]** academic year would also be appreciated. If you require any further information, please do not hesitate to contact me by phone at **[your area code and phone number]** or via e-mail at **[your e-mail address]**.

Thank you for your consideration. I look forward to hearing from you soon.

Sincerely,

[Your Name]

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COST OF ATTENDANCE COMPARISON WORKSHEET

The actual cost of attendance (COA) is unique for each student at each school. While some expenses are fixed (like tuition and fees), others are influenced and controlled by the student's lifestyle (like housing and personal expenses). When considering the award package from a particular school, or in comparing packages from multiple schools, you can use this worksheet to compare your cost expectations to each school's estimated total COA. The goal of this comparison is to better decide if the resulting difference is realistically manageable given the resources available to your family and the aid being offered by each school. Copy this worksheet as needed.

| School | 1. | | 2. | | 3. | |
|--|----------------|-------------------|----------------|-------------------|----------------|-------------------|
| | My Expectation | School's Estimate | My Expectation | School's Estimate | My Expectation | School's Estimate |
| Tuition and Fees | \$ | \$ | \$ | \$ | \$ | \$ |
| Room | \$ | \$ | \$ | \$ | \$ | \$ |
| Board | \$ | \$ | \$ | \$ | \$ | \$ |
| Books and Supplies | \$ | \$ | \$ | \$ | \$ | \$ |
| Computer Costs | \$ | \$ | \$ | \$ | \$ | \$ |
| Transportation | \$ | \$ | \$ | \$ | \$ | \$ |
| Personal: | | | | | | |
| Clothing | \$ | \$ | \$ | \$ | \$ | \$ |
| Laundry | \$ | \$ | \$ | \$ | \$ | \$ |
| Medical | \$ | \$ | \$ | \$ | \$ | \$ |
| Entertainment | \$ | \$ | \$ | \$ | \$ | \$ |
| Other_____ | \$ | \$ | \$ | \$ | \$ | \$ |
| Other_____ | \$ | \$ | \$ | \$ | \$ | \$ |
| Other_____ | \$ | \$ | \$ | \$ | \$ | \$ |
| Total COA | \$ | \$ | \$ | \$ | \$ | \$ |
| Difference between my expectation and school's estimate | \$ | | \$ | | \$ | |

AWARD LETTER COMPARISON WORKSHEET

Different schools have different resources, so financial aid offers can vary greatly from school to school. There are several components of an aid offer you should consider:

- *Direct costs, which are billed to you by the school (e.g., tuition and fees), and are not always finalized figures at the time you receive your award letter.*
- *Indirect costs, which are estimated expenses over which you may have some control (e.g., books and supplies).*
- *Scholarships and grant awards, referred to as gift aid. Be sure you understand how additional outside scholarships you receive may impact the aid offered by the school.*
- *Loans and work, also referred to as self-help aid, which you can accept, accept in part, or decline. Always remember: Loans must be repaid! Never borrow more than you need.*
- *Out-of-pocket costs remaining after subtracting offered aid from the total cost of attendance that you or your parents may have to find other resources to cover, such as parent loans, or additional part-time employment.*
- *Student consumer information and disclosures (such as graduation and transfer-out rates) that the school must provide, either with the award letter, by reference, or by link to other materials—be sure to review carefully.*

Award letters usually only cover one academic year, and amounts awarded may change from year to year. Check the school's website or publications or contact the school's financial aid office for more information on the terms and conditions of gift aid (such as renewability in future years) and self-help aid.

| Award Letter from School: | 1. | 2. | 3. |
|---|-----|-----|-----|
| Cost of Attendance (COA) | | | |
| Direct Costs | | | |
| Tuition and Fees | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Indirect Costs | | | |
| Transportation: | \$ | \$ | \$ |
| Miscellaneous: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Other: | \$ | \$ | \$ |
| Total Costs: | \$ | \$ | \$ |
| Expected Family Contribution (EFC) | -\$ | -\$ | -\$ |
| Total Need: (COA – EFC) | \$ | \$ | \$ |

| | | | |
|--|---|---|---|
| Award Letter from School: | 1. | 2. | 3. |
| Scholarship and Grant Awards (Gift Aid): | | | |
| 1. | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No | \$ Renewable? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Total Gift Aid: | \$ | \$ | \$ |
| Net Cost After Gift Aid | \$ | \$ | \$ |
| Work (Self-Help): Source and Hours per Week | Wages | Wages | Wages |
| 1. | \$ | \$ | \$ |
| 2. | \$ | \$ | \$ |
| Loans (Self-Help): Source and Interest Rates | | | |
| 1. (%) | \$ | \$ | \$ |
| 2. (%) | \$ | \$ | \$ |
| 3. (%) | \$ | \$ | \$ |
| 4. (%) | \$ | \$ | \$ |
| Total Self Help: | \$ | \$ | \$ |
| Total Unmet Need (COA – EFC – Aid) | \$ | \$ | \$ |
| Assumptions | | | |
| Enrollment (e.g., full-time) | | | |
| Living status (e.g., on-campus) | | | |
| Other: | | | |
| Other: | | | |
| Consumer Information: | | | |
| Online? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Email? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Paper? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Contact Information for the Financial Aid Office: | | | |
| Deadlines and Next Steps: | | | |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |



FINANCIAL AID APPLICATION CHECKLIST

Use this checklist to plan what you need to do to apply for and receive financial aid. Due to limited resources, student aid is often awarded on a first-come, first-served basis. Many of these checklist items have deadline dates which vary from school to school, so you should indicate the date by which you will need to complete each item for each school. Check off each Action Item as you complete it. You can get help for many of these Action Items from each college's website or financial aid office, your guidance or college counselor, or your local reference librarian. Make copies and complete this checklist for each school to which you are planning to apply.

| <input checked="" type="checkbox"/> Due Date (if any) | Application Processing Action Item for: ----- (School) |
|--|--|
|--|--|

- _____ Request information and application forms from the school(s) to which you are planning to apply. Request information regarding any need-based and non-need-based institutional grants and scholarships. When you receive this information, note all required application materials and their deadlines below.

- _____ Request information, required application forms, and materials from your state regarding all state student aid programs for postsecondary education. When you receive this information, note all required application materials and their deadlines, many of which appear in the checklist below.

- _____ Investigate private sources of financial aid. Check with your school and local libraries, local businesses and civic organizations, and your parents' employer(s). Take advantage of *free* Internet scholarship search engines, such as:
 - FinAid – www.finaid.org
 - Big Future by The College Board – <https://bigfuture.collegeboard.org/scholarship-search>
 - Fastweb – www.fastweb.com

- _____ Check the following sources to verify the legitimacy of any financial aid consultants or search services you may use or hire and for tips on avoiding scholarship scams:
 - U.S. Department of Education: <http://studentaid.ed.gov/types/scams>
 - Federal Trade Commission: www.consumer.ftc.gov
 - <http://www.consumer.ftc.gov/articles/0082-scholarship-and-financial-aid-scams>
 - <http://www.consumer.ftc.gov/articles/0160-student-loans>
 - Better Business Bureau: www.bbb.org

| <input checked="" type="checkbox"/> Due Date (if any) | Application Processing Action Item |
|--|---|
| <input type="checkbox"/> | Obtain a Federal Student Aid Personal Identification Number (FSA PIN) for use throughout the federal aid process during and after college from the U.S. Department of Education's PIN website at www.pin.ed.gov . |
| <input type="checkbox"/> | File your Free Application for Federal Student Aid (FAFSA) as soon as possible on or after January 1, 2014. You may file the FAFSA electronically using FAFSA on the Web, which contains built-in edits to help prevent costly mistakes, at www.fafsa.gov . You may also file a PDF FAFSA, available at http://www.fafsa.ed.gov/options.htm or a paper FAFSA, obtained by calling the Federal Student Aid Information Center at 1-800-433-3243. |
| <input type="checkbox"/> | Complete and submit all institutional financial aid application materials before all deadlines. |
| <input type="checkbox"/> | Apply for state financial aid before the application deadline and promptly reply to any requests for additional information. |
| <input type="checkbox"/> | Promptly respond to any school requests for additional information or documentation, such as copies of tax return transcripts, verification worksheets, or other forms. |
| <input type="checkbox"/> | Review your Student Aid Report (SAR), which is sent to you via email or postal mail after you file the FAFSA, for accuracy. If necessary, correct inaccurate items online at www.fafsa.gov or on the paper SAR, if you receive one. |
| <input type="checkbox"/> | Read all application materials and financial aid notifications. Most financial aid funds have conditions for receipt and renewal, such as earning a certain grade point average (GPA) or being enrolled full time. <i>Details are important, so be sure to avoid costly mistakes!</i> |
| <input type="checkbox"/> | Promptly sign and return your financial aid award letter if your school requires your signed acceptance of the aid being offered. Some schools give students the option of accepting financial aid awards electronically. Contact the financial aid office if you have any questions about your award. |
| <input type="checkbox"/> | Notify the financial aid office if you have applied for assistance, but no longer wish to attend the school. |
| <input type="checkbox"/> | Complete the promissory note for any loan(s) you are offered and wish to accept. Before you sign the promissory note, make sure you read and understand all of your rights and responsibilities. <i>Remember this is a source of financial assistance that must be repaid!</i> The financial aid office may have you sign either an electronic or paper promissory note. If you do not want to use an electronic promissory note, ask the financial aid office for a paper one. Check with the financial aid office regarding any loan counseling you must complete before you may receive the loan proceeds. |



**Due Date
(if any)**

Application Processing Action Item

- _____ If you have been awarded Federal Work-Study (FWS), find out how students are placed in FWS positions and what FWS positions are available, including descriptions of job responsibilities and wages.
- _____ Promptly notify the financial aid office of any private scholarship, grant, or other type of student aid you have received or expect to receive.
- _____ Keep copies of all application materials in your records for future reference.