

**Instructions:**

Please complete and submit this form in a sealed envelope.

Mail or drop off to: **Awards & Financial Aid Office, 202 Robertson Hall  
Carleton University, 1125 Colonel By Drive, Ottawa, ON, K1S 5B6**

Personal Information		
Last Name	First Name	Carleton Student / Applicant number
Citizenship Status		Social Security Number (SSN)
<input type="checkbox"/> American <input type="checkbox"/> Dual American/Canadian <input type="checkbox"/> Other		
I hold a	Date of Birth:	Email Address:
<input type="checkbox"/> Student Visa <input type="checkbox"/> Diplomatic Visa		
<b>Canadian Address (while attending Carleton University):</b>		
Street	City/Town	Province      Postal Code
<b>American Address:</b>		
Street	City/Town	Province      Postal Code
Academic Information		
<input type="checkbox"/> Bachelor Degree	<input type="checkbox"/> Masters Degree	<input type="checkbox"/> PhD Degree
Program name	Major or concentration	Program Year (eg. Yr1, Yr2, Y3, Y4)
<b>I have or will be registering full time for the following academic sessions:</b>		
<input type="checkbox"/> Fall term (SEPT - DEC) Year:	<input type="checkbox"/> Winter term (JAN - APRIL) Year:	<input type="checkbox"/> Summer term (MAY - AUG) Year:
Funding Information / Loan Profile		
<b>I am a first time U.S. student loan borrower:</b> <input type="checkbox"/> Yes <input type="checkbox"/> No  <b>I have completed the following on-line entrance counseling module(s):</b>  <input type="checkbox"/> Direct Loan <input type="checkbox"/> Direct Plus Loan	<b>Requested Loan Type(s): (Check all that apply)</b>  <input type="checkbox"/> Subsidized Loans (undergraduate only) <input type="checkbox"/> Unsubsidized Loans <input type="checkbox"/> Parent PLUS Loans (dependent student) <input type="checkbox"/> Graduate PLUS Loans (graduate only)	<input type="checkbox"/> I am requesting a letter of anticipated aid for my student VISA application.  Deadline: _____
<b>Please indicate the amount of income you expect to receive during the study period from the following:</b>		
Scholarships: \$ _____	RA: \$ _____	Other awards (please specify):
Bursaries: \$ _____	TA: \$ _____	\$ _____

**To be considered for U.S. Direct Loans, you must:**

- ✓ Complete the **Free Application for Federal Student Aid (FAFSA)**. Ensure that you specify Carleton University as the institution you wish to attend.

**Carleton's federal school code is: G08368**

- ✓ Complete and E-sign a **Master Promissory Note (MPN)**. Parents borrowing funds through a Direct PLUS loan for Parents must also complete a Master Promissory Note (MPN).
- ✓ All first time borrowers must participate in student on-line entrance counseling. If this is your first student loan, please complete the **Direct Loan Entrance Counseling** module.
- ✓ Once the Awards & Financial Aid Office at Carleton University has determined your eligibility, **you will be contacted via email concerning all pertinent information related to the administration and processing of your U.S. Direct Loans.**

**Important Information:**

1. Students in receipt of U.S. Direct Loans are required to maintain **satisfactory academic progress**.
2. Changes to course load, including dropping a course or withdrawal, may result in ineligibility for all or part of your student loan funding (refer to **Return of Title IV Funds Policy**)
3. The Higher Education Reconciliation Act (HERA) specifies that a program offered by a foreign school that uses telecommunications as a method of delivery is not eligible for student loan funds. "Telecommunications" is defined as "the use of television, audio, or computer transmission, including open broadcast, closed circuit, cable, microwave, or satellite, audio conferencing, computer conferencing, or video cassettes or discs." At Carleton University, this includes courses via CUTV, Tapes to You Service and Carleton University OnLine (CUOL). **Students must carefully consider which courses they register in to comply with the legislation and to maintain their eligibility for student loan funding.**

The **Satisfactory Academic Progress (SAP) Policy** and the **Return of Title IV Funds Policy** is available at: <http://carleton.ca/awards/student-loans/>

**Student's Declaration and Signature:**

I declare that the above information is true and accurate. I understand that I must inform the Awards & Financial Aid Office at Carleton University of any change in my circumstances, including but not limited to changes in enrolment, student status, awards, academic probation, living arrangements, contact information, etc. I acknowledge that it is my responsibility to read and understand the Satisfactory Academic Progress (SAP) and Return of Title IV Funds Policies.

Student's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**For further information, please contact:**

Awards & Financial Aid Office, 202 Robertson Hall  
Carleton University, 1125 Colonel By Drive, Ottawa, ON, K1S 5B6  
(Tel): 613-520-3600 or 613-520-2600 ext. 8501  
email: [awards@carleton.ca](mailto:awards@carleton.ca) (please reference U.S. Student Aid in the email subject line)

*At Carleton University, we recognize and respect the importance of privacy. Personal information that we collect is kept confidential. In accordance with section 41 of the Freedom of Information and Protection of Privacy Act, Carleton University will only use the information in its custody or control in the following circumstances: where the individual identifies the particular information and consents to its use; for the purpose for which it was collected or a consistent purpose (i.e. a purpose which the individual might have reasonably expected).*