



## UNIVERSITY OF OTAGO – U.S. FEDERAL LOAN APPLICATION – 2019/20 AWARD YEAR

All students attending the University of Otago and requesting Federal Loans must complete this application form each year they require financial assistance. No loans will be certified by Otago until a completed application is submitted.

PERSONAL DETAILS	
Name:	
Otago Student ID Number:	
Social Security Number:	
Date of Birth:	MM/DD/YYYY
Email:	
Permanent Home Address (including Zip Code):	
Programme of Study:	
Year of Study at Otago (e.g. 1 <sup>st</sup> , 2 <sup>rd</sup> ):	

ELIGIBILITY	YES	NO
Are you a US citizen or eligible non-citizen?	<input type="checkbox"/>	<input type="checkbox"/>
Are you a permanent resident or citizen of New Zealand or Australia?	<input type="checkbox"/>	<input type="checkbox"/>
Have you completed your High School Diploma or GED? <i>- Please provide a copy of this qualification</i>	<input type="checkbox"/>	<input type="checkbox"/>
Have you or your parents on your behalf, applied for US Financial Aid at any time during the last 12 months to another institution?	<input type="checkbox"/>	<input type="checkbox"/>
Are you enrolled or been offered a place in a Bachelor, Masters or Doctoral programme? <i>- Please note that medical programmes are NOT eligible</i>	<input type="checkbox"/>	<input type="checkbox"/>

ALL STUDENTS - Please go to <a href="http://www.studentloans.gov">www.studentloans.gov</a> and complete the following	YES	N/A
Step 1: <b>2019/20 FAFSA</b> to produce a Student Aid Report (SAR / ISIR) for the award year	<input type="checkbox"/>	<input type="checkbox"/>
Step 2: <b>Entrance Counselling</b> (only required for first time borrower at Otago at each grade level)	<input type="checkbox"/>	<input type="checkbox"/>
Step 3: <b>Master Promissory Note</b> (MPN) - Loan Agreement for a Subsidized/Unsubsidized Loan	<input type="checkbox"/>	<input type="checkbox"/>
<b>PLUS LOANS</b> - Graduate students and parents of Dependent Undergraduate students		
Step 4: <b>Master Promissory Note</b> (MPN) - Loan Agreement for a PLUS Loan	<input type="checkbox"/>	<input type="checkbox"/>

ESTIMATED FINANCIAL ASSISTANCE (EFA)	YES	NO
Have you (or your parents on your behalf) applied for other types of funding to support your study at the University of Otago for this award year (including Studylink)?	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide the following information. If the scholarship or grant has been awarded please provide the supporting documentation confirming this.		
Scholarship / Grant Details: _____		
Amount of funding applied for: _____ USD or NZD		
Amount of funding <b>award</b> for: _____ USD or NZD		

**DECLARATION**

I confirm that I will immediately notify the US Financial Aid office should my enrolment circumstance change, including:

- Withdrawing from my programme
- Intention to take an approved leave of absence (deferral or temporarily withdraw)
- Intention to change my programme
- I am awarded residency in New Zealand or Australia

I understand and agree that I may be required to pay back funds to Otago, if through my actions the University is required to reimburse funds to the United States Department of Education or its approved lenders

Satisfactory Academic Progress:

I agree to be bound by the specified Satisfactory Academic Progress policy. Either:

- Achieving a minimum GPA of at least 2.0, which is equivalent to a "C" grade (55-59%) at the end of each semester, or
- Research students are required to meet milestone reports as set by the Graduate Research School. Masters and PhD supervisors will be required to confirm that a student is at satisfactory progress at the end of each semester and prior to the next term's disbursement.

For further information, please refer to: <http://www.otago.ac.nz/international/usfinancialaid/index.html>

I understand that should I be enrolled in a thesis, dissertation or project work, I am required to remain on campus for the duration of my enrolment to be eligible for US Financial Aid.

In accordance with The Privacy Act (1993), the University of Otago might give any information referred to above to entities other than the Parties and the Service Providers where it is required or allowed by law (in New Zealand or the United States) or where I have otherwise consented.

I confirm that the funds awarded under the US Financial Aid program for this award year will only be used to support my (in the case of a Parent PLUS application - my child's) educational expenses.

I agree to undertake online Exit Counselling if my enrolment is less than half-time or at the completion of my studies at Otago

**WHY HAVE YOU CHOSEN TO STUDY AT THE UNIVERSITY OF OTAGO?**

Signature of Student

Date:

*Dependent Students Only:*

Name of Parent:

Signature of Parent:

Date:

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PLEASE RETURN THIS FORM TO (email is fine)

US Financial Aid Office  
International Office  
PO Box 56  
Dunedin 9054  
New Zealand

Tel: + 64 3 479 8344  
Fax: + 64 3 479 8367  
Email: [us.financialaid@otago.ac.nz](mailto:us.financialaid@otago.ac.nz)