

**Please read the Partners in Education with Parents (PEP) information before completing this application. We encourage early application. Submission of the PEP application does not mean you are obligated to accept the loan. International families must have a U.S. citizen co-applicant (see page 4).**

*If you prepay entirely, complete only the shaded sections. If you borrow or select a combination, complete the entire application.*

**STUDENT INFORMATION:**

Please Print

1. Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ 2. Birthdate: \_\_\_\_-\_\_\_\_-\_\_\_\_\_

3. Name: \_\_\_\_\_  
Last First M.I.

4. Academic level in the 2011-2012 school year:  freshman  sophomore  junior  senior

**PARENT APPLICANT AND CO-APPLICANT INFORMATION:**

**If you file your federal income tax jointly complete the Parent Applicant and Co-Applicant\* sections.**

**Applicant**

Please Print  Mr.  Mrs.  Ms.  Dr.

5. Name: \_\_\_\_\_  
Last First M.I.

6. Address: \_\_\_\_\_

7. City/State & Zip: \_\_\_\_\_

8. Home Phone Number: ( ) \_\_\_\_\_

9. Birthdate: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

10. Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

11. Employer: \_\_\_\_\_

12. Occupation: \_\_\_\_\_

13. Employer Address: \_\_\_\_\_

14. City/State & Zip: \_\_\_\_\_

15. Work/Cell Phone Number: ( ) \_\_\_\_\_

16. E-mail Address: \_\_\_\_\_

**\*Co-Applicant (normally spouse)**

Please Print  Mr.  Mrs.  Ms.  Dr.

17. Name: \_\_\_\_\_  
Last First M.I.

18. Address: \_\_\_\_\_

19. City/State & Zip: \_\_\_\_\_

20. Home Phone Number: ( ) \_\_\_\_\_

21. Birthdate: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

22. Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

23. Employer: \_\_\_\_\_

24. Occupation: \_\_\_\_\_

25. Employer Address: \_\_\_\_\_

26. City/State & Zip: \_\_\_\_\_

27. Work/Cell Phone Number: ( ) \_\_\_\_\_

28. E-mail Address: \_\_\_\_\_

**FINANCIAL INFORMATION**

Please provide financial information requested below for both applicant and co-applicant, if applicable.

29. As of the most recent statement please provide the market value of the following assets:

a) Liquid Assets (Cash, Savings, Checking) \$ \_\_\_\_\_

b) Investments outside Retirement Plan(s) (Stocks, Bonds, Mutual Funds, CD's, other) \$ \_\_\_\_\_

c) Retirement Investments (401(k), IRAs, 403(b), Other) \$ \_\_\_\_\_

30. As of the most recent statements, provide the net worth of: Current Businesses \$ \_\_\_\_\_ Real Estate Investment \$ \_\_\_\_\_

31. Do you own your home? If Yes, what is your monthly payment? \$ \_\_\_\_\_ If No, what is your monthly rent? \$ \_\_\_\_\_

**Note: Unless already on file in Student Financial Services, enclose a copy of your (and your co-applicant's, if appropriate) 2010 federal income tax return, including Schedule A, if applicable (only if borrowing). If you are self-employed, please also enclose your 2009 return. This information will be treated in the strictest confidence.**

**PEP WORKSHEET**

Use this worksheet to calculate the amount of university charges you would like to borrow or prepay. Note: You may customize your PEP Multiyear borrowed amount by choosing different housing and meal plans in upperclass years. Please contact a PEP representative at (800) 468-0569 to discuss your options.

	<b>Sample</b>	<b>Your Calculation</b>
<b>Tuition</b>	\$40,950	\$40,950
<b>Student Activity Fee</b>	410	410
<b>Student Health Fee</b>	632	632
<b>Housing Charges* (select one, or enter "0")</b>	\$8,374	_____
<small>*Your housing choice in this calculation does not guarantee your student will be assigned to your first choice by Residential Life.</small>		
<b>Modern:</b> Single \$10,492*, Double \$9,264, Triple \$6,984		
<b>Traditional:</b> Single \$9,506 Double \$8,374, Triple \$6,324		
<small>*Available only to upperclassmen and students with documented medical needs.</small>		
<b>Food Service (select one, or enter "0")</b>	\$4,300	_____
<small>Bronze \$3,600*, Silver \$4,300, Gold \$5,000, Off-Campus Plan \$1,000**.</small>		
<small>*Not available to freshmen **Available only to commuting students living off-campus.</small>		
<b>Total University Charges</b>	<b>\$54,666</b>	<b>\$ _____</b>
Subtract your 2011-2012 financial assistance award <i>(Include scholarships, grants, and student loans. Exclude Federal Work-Study)</i>		
		_____
This is your Base-year PEP Participation amount		\$ _____
Enter the number of years you want covered by PEP (1,2,3, or 4)		_____
Multiply the Base-year PEP participation amount by the years of PEP Participation to determine your total PEP loan or prepayment amount		\$ _____

**PEP PARTICIPATION:**

32. How would you like to participate?     Multiyear     Prepay     Annual     Combination (Multiyear and Prepay)

33. If you selected the PEP Multiyear Option, how much would you like to borrow? *(based on worksheet above)*    \$ \_\_\_\_\_

34. If you selected the PEP Annual Option, how much would you like to borrow for the 2011-2012 school year? *(based on worksheet above)*    \$ \_\_\_\_\_

35. If you selected the PEP Prepay Option, how much do you plan to prepay? *(based on worksheet above)*    \$ \_\_\_\_\_

36. If you selected a combination of Multiyear and Prepay Options, how much would you like to borrow under the Multiyear Option, and how much would you like to prepay under the Prepay Option? *(based on worksheet above)*

Multiyear Option borrowing \$ \_\_\_\_\_                      Prepay Option prepayment \$ \_\_\_\_\_

Is there any aspect of your financial situation that, in your judgment, may adversely affect your ability to repay your PEP loan? If so, please explain on a separate sheet of paper. (Examples: suits, judgments pending, guarantor of someone else's debt, adverse credit rating, etc.)

The USA Patriot Act of 2001 (Section 326) requires us to obtain, verify, and record information that identifies each person who receives a loan from our institution. The information we are required to collect prior to approving your loan includes your full name, date of birth, and permanent address. Federal law also permits us to request additional identifying information and documentation, such as a social security number to verify your identity in connection with this application.

If you have selected the PEP Multiyear or PEP Annual Option, your signature authorizes Washington University to obtain a credit report to verify the information you have provided on this application.

37. Applicant's Signature: \_\_\_\_\_ (date)

38. Co-Applicant's Signature: \_\_\_\_\_ (date)

**Please call (800) 468-0569 if you have any questions**