



Student Accounts Office  
Administration Building Rm. 211  
San Luis Obispo, CA 93407

# Federal Perkins & Institutional Loan Application & Exit Interview Packet

**NOTE:** Incomplete applications (missing information/forms) will be returned. Your loan will not be disbursed until all forms are submitted. Forms must be signed in ink. Replacement forms: <http://studentaccounts.calpoly.edu>

## INSTRUCTIONS:

1. Read all the information below. This information will help you fill out the required forms correctly.
2. Lift this top sheet and complete the "STATEMENT OF RIGHTS AND RESPONSIBILITIES".
3. Extract the original, signed "STATEMENT OF RIGHTS AND RESPONSIBILITIES" as instructed at the bottom of that sheet.
4. Complete the face and back of the "STUDENT LOAN WORKSHEET", the last page of this packet.
5. Extract the "STUDENT LOAN WORKSHEET" as indicated.
6. Submit the required completed LOAN APPLICATION or EXIT INTERVIEW FORMS to the address shown above.

## LOAN APPLICATION PROCESS (FORMS TO SUBMIT):

1. Promissory Note  
**Important:** Do not make any changes to the Note.
2. Statement of Rights & Responsibilities (second page of this packet)
3. Student Loan Worksheet (last page of this packet)

## LOAN EXIT INTERVIEW PROCESS (FORMS TO SUBMIT):

1. Disclosure Statement
2. Statement of Rights & Responsibilities (second page of this packet)
3. Student Loan Worksheet (last page of this packet)
4. Billing cycle adjustment request (optional)

## ANSWERS TO COMMONLY ASKED QUESTIONS ABOUT THE ENCLOSED STUDENT LOAN WORKSHEET

### Borrower Information:

- ❖ All information is required, *except* email, cell & pager info. If you are unemployed, please indicate.

### Spousal Information:

- ❖ If you answered "yes" to question (3), please complete. Otherwise, leave it blank.

### Borrower Parental Information:

- ❖ Unless a parent is deceased, or you have no contact, this information is required! Refer to "employer responses" for additional information.

### Spouse's Parental Information:

- ❖ If you are not married you may leave this section blank; otherwise please complete.  
Note: refer to *Borrower's Parental Information* (above) for completion assistance.

### Required Reference Information:

- ❖ All references provided must reside in the U.S., be at least 18 years of age, and have a home phone number.
- ❖ Unless the reference you are listing is a relative, the reference cannot be a Cal Poly staff member, or current Cal Poly student.
- ❖ No reference you list can have the same home address/phone as you, your parents, your spouse's parents, or each other, *no exceptions!*
- ❖ References listed *can* share the same employer.

### Employer responses:

- ❖ If employed, provide all requested information. If self-employed, please indicate. If a student, indicate school of attendance (list permanent address, *not* school address.  
*Acceptable responses:* "unemployed", "homemaker", "disabled", "retired", etc. **DO NOT LEAVE LINES BLANK!**

**DO NOT CROSS THROUGH ANY LINES.... DO NOT ANSWER ANY QUESTIONS WITH "N/A".... DO NOT LEAVE LINES BLANK**

## STUDENT LOAN EXIT INTERVIEW REQUIREMENT – AVOID A RECORDS HOLD

If you accept this student loan, or any other student loan, while enrolled at Cal Poly you are required to complete a student loan exit interview, per loan type, in your last consecutive term of at least half time enrollment at Cal Poly. For more information please access the Student Accounts web page at <http://studentaccounts.calpoly.edu>.

## GENERAL LOAN TERMS (PER LOAN TYPE)

	Federal Perkins	Federal Stafford (sub/unsub)	Institutional	Alternative
Type of loan?	Federal	Federal	Non-federal	Non-federal
Lender?	Cal Poly (805) 756-2608 Billing (800) 334-8609	Bank / EDFUND (800) 298-9490	Cal Poly (805) 756-2608 Billing (800) 334-8609	Review your forms – Financial Aid web site
Interest rate?	5% fixed	Variable – ask lender	4% fixed	Ask lender
Grace period?	9 months after dropping below the required units	6 months after dropping below the required units	6 months after dropping below the required units	Ask lender
Grace period begins when I drop below the following # of units:	Undergraduates: 6 units Graduates: 4 units	Undergraduates: 6 units Graduates: 4 units	Undergraduates: 6 units Graduates: 4 units	Ask lender
Payment frequency:	Every 3 months or monthly-your choice	Monthly	Monthly	Monthly
Deferment/forbearance options?	Yes, refer to Promissory Note	Yes, refer to Promissory Note	Yes, refer to Promissory Note	Refer to Promissory Note
Exit interview requirement?	Yes	Yes	Yes	No

Loan Consolidation questions? Access the Student Accounts web page: <http://studentaccounts.calpoly.edu> (Loan Information link)





**RETURN TO:** Cal Poly San Luis Obispo  
 Student Accounts Office  
 Administration Building Rm. 211  
 San Luis Obispo, CA 93407

## STUDENT LOAN WORKSHEET FOR FEDERAL PERKINS & INSTITUTIONAL STUDENT LOANS

**COMPLETE BOTH SIDES OF THIS WORKSHEET AND SUBMIT WITH SUPPORTING DOCUMENTS (SEE PAGE ONE)**

**BORROWER INFORMATION:**

1. NAME: FIRST MIDDLE LAST			2. DATE OF BIRTH: (MO/DAY/YEAR)		
3. MARTIAL STATUS: ___ SINGLE ___ MARRIED		4. SOCIAL SECURITY NUMBER		5. DRIVER'S LICENSE OR STATE IDENTIFICATION CARD	
6. LOCAL (SCHOOL) ADDRESS. IF YOU DON'T HAVE ONE YET, COMPLETE PERMANENT ADDRESS ONLY. MAILING ADDRESS  CITY STATE ZIP			7. PERMANENT MAILING ADDRESS. REFERENCE AN ADDRESS WHERE YOU CAN ALWAYS GET YOUR MAIL MAILING ADDRESS  CITY STATE ZIP		
8. REQUIRED PHONE NUMBERS:		LOCAL AT SCHOOL ( WITH AREA CODE)	PERMANENT (WITH AREA CODE)	WORK (WITH AREA CODE & EXTENSION)	
9. OPTIONAL INFORMATION:		E-MAIL ADDRESS	CELL PHONE ( WITH AREA CODE)	PAGER ( WITH AREA CODE)	
10. BORROWER'S EMPLOYER, NAME OF COMPANY AND COMPLETE MAILING ADDRESS					

**SPOUSE INFORMATION: IF YOU ARE NOT MARRIED SKIP TO QUESTION #15**

11. NAME: FIRST MIDDLE LAST			12. DATE OF BIRTH: (MO/DAY/YEAR)		
13. SOCIAL SECURITY NUMBER		14. IS YOUR SPOUSE ATTENDING SCHOOL? ___NO ___YES SCHOOL:		IF "YES" WHERE? NAME, CITY & STATE OF SCHOOL	

**BORROWER'S PARENTAL INFORMATION: (REQUIRED)**

15. FATHER: NAME: FIRST MIDDLE LAST			FATHER'S EMPLOYER		
MAILING ADDRESS			EMPLOYER'S MAILING ADDRESS		
CITY	STATE	ZIP	PHONE NO. WITH AREA CODE	CITY	STATE
16. MOTHER: NAME: FIRST MIDDLE LAST			MOTHER'S EMPLOYER		
MAILING ADDRESS			EMPLOYER'S MAILING ADDRESS		
CITY	STATE	ZIP	PHONE NO. WITH AREA CODE	CITY	STATE

**CONTINUED ON NEXT PAGE...**

**STUDENT LOAN WORKSHEET PAGE 2**

**SPOUSE'S PARENTAL INFORMATION: REQUIRED IF YOU ARE MARRIED; OTHERWISE SKIP TO QUESTION #20**

17. FATHER: NAME: FIRST MIDDLE LAST				18. MOTHER: NAME: FIRST MIDDLE LAST			
MAILING ADDRESS			HOME: AREA CODE & PHONE NO.	MAILING ADDRESS			HOME: AREA CODE & PHONE NO.
CITY	STATE	ZIP	WORK: AREA CODE & PHONE NO.	CITY	STATE	ZIP	WORK: AREA CODE & PHONE NO.

**REFERENCES:** Please review page 1 of this packet for more information.

**20. List two (2) relatives, other than your parents, who will always know your address. You may use close family friends if you do not have relatives with U. S. addresses. Each reference must have a different home address and phone number and they cannot be the same as yours, your parents, or any other reference listed. References must be at least 18 years old.**

1. RELATIVE REFERENCE NAME				MAILING ADDRESS			
EMPLOYER NAME			HOME: AREA CODE & PHONE NO.	CITY			STATE ZIP
2. RELATIVE REFERENCE NAME				MAILING ADDRESS			
EMPLOYER NAME			HOME: AREA CODE & PHONE NO.	CITY			STATE ZIP

**21. List three (3) references, other than Cal Poly students, staff, or previously listed references who will always know your address. Each reference must have a different home address and phone number and they cannot be the same as yours, your parents, or any other reference listed. References must be at least 18 years old.**

1. REFERENCE NAME				MAILING ADDRESS			
EMPLOYER NAME			HOME: AREA CODE & PHONE NO.	CITY			STATE ZIP
2 REFERENCE NAME				MAILING ADDRESS			
EMPLOYER NAME			HOME: AREA CODE & PHONE NO.	CITY			STATE ZIP
3. REFERENCE NAME				MAILING ADDRESS			
EMPLOYER NAME			HOME: AREA CODE & PHONE NO.	CITY			STATE ZIP

**I certify that to the best of my knowledge the information provided is true and correct. I acknowledge that I am receiving a loan that must be repaid, and that I am required to notify Cal Poly, or the student loan billing service, AMS, formerly EFG Technologies, of all changes until the loan is paid in full. I understand that my failure to repay this loan as outlined in the promissory note terms and conditions will result in Cal Poly, SLO withholding all University services until my loan delinquency is resolved.**

**BORROWER'S SIGNATURE**

**DATE OF SIGNATURE**

Submit this worksheet to the address shown on page 1 of this packet along with the other required documents.

