

PEPPERDINE UNIVERSITY SCHOOL OF LAW

The Caruso Family Loan Forgiveness Fund and Judge Harry T. Shafer Loan Repayment Assistance Fund

2014-2015

Self Qualifying Questionnaire and Eligibility Estimate

Applicant: _____ SSN: _____
(print name)

Qualifying Criteria:

- | | | |
|--|-----|----|
| 1. Are you a Pepperdine Law School graduate?
Graduation Date _____ | Yes | No |
| 2. Did you pass the Bar within two years of graduation?
Date _____ State _____ | Yes | No |
| 3. Have you been employed by a federal, state or local government agency
or by a non-profit organization for at least one-year? | Yes | No |
| 4. Is a law degree required for this position? | Yes | No |
| 5. Is your individual income or 50% of you and your
spouse's combined income less than \$65,000? | Yes | No |
| 6. Do you have outstanding educational loans that were borrowed to
finance studies at Pepperdine School of Law? Are these loans in
repayment and in good standing? | Yes | No |
| 7. Have you submitted all of the required documentation with your application? | Yes | No |
| 8. During law school, did you work in public service with the Legal Aid Clinic and/or
Union Rescue Mission? If so, please explain the work experience. If not, please
explain what type of work experience you obtained. | Yes | No |

If you answered "yes" to each of these questions, you may qualify for the Caruso Family Loan Forgiveness Fund or the Judge Harry T. Shafer Loan Repayment Assistance Fund.

Application materials and W-9 should be returned to:
Pepperdine University School of Law
Office of Financial Assistance
ATTN: Erin Michelle Wade
24255 Pacific Coast Highway
Malibu, CA 90263-4633

The application deadline is January 9, 2015

PEPPERDINE UNIVERSITY SCHOOL OF LAW

I. PERSONAL DATA

Name: _____

Social Security Number: _____

Address: _____

Home Telephone: _____ Work Telephone: _____

Marital Status: _____

Age of Dependents: _____

Law School Graduation Date: _____

State Bar Examination Pass Date: _____

State(s): _____

(applicant must pass a state bar examination or an equivalent within two years of graduation)

Annual Income: _____

(attach a signed copy of you and your spouse's (if applicable) most recent federal income tax return, including all schedules, wage earning statements (W-2) and any miscellaneous taxable income reported on form 1099)

II. EMPLOYMENT INFORMATION

Current Employer: _____

Employer's Address: _____

Employer's Telephone Number: _____

Start Date: _____

Full time: _____ Part time: _____ (please check one)

Annual Salary: _____

Job Title: _____

III. PREVIOUS EMPLOYMENT INFORMATION

Previous Employer: _____

Employer's Address: _____

Employer's Telephone Number: _____

Start Date: _____

Full Time: _____ Part Time: _____ (please check one)

Annual Salary: _____

Job Title: _____

IV. SPOUSE'S EMPLOYMENT INFORMATION

Spouse's Current Employer: _____

Employer's Address: _____

Employer's Telephone Number: _____

Start Date: _____

Full Time: _____ Part Time: _____ (please check one)

Annual Salary: _____

Job Title: _____

V. QUALIFYING LOANS

In determining the applicant's educational loan repayment obligations, all educational purpose loans, approved and certified by the School of Law, or loans made by the School of Law shall be considered.

- Please complete the following table.
- For all qualifying loans, please submit documentation of loan payments made this calendar year. Documentation may include a statement from the lender(s) listing payment information.

<u>Loan Type</u>	<u>Lender</u>	<u>Outstanding Balance</u>	<u>Monthly Payment</u>
Perkins/NDSL	School of Law	_____	_____
Pepperdine Loan	School of Law	_____	_____
Stafford/GSL	_____	_____	_____
Graduate PLUS	_____	_____	_____
Private	_____	_____	_____

Under penalty of perjury, I certify that all information on this application is true and complete to the best of my (our) knowledge. I understand that my application materials are due no later than: **January 9, 2015.**

I agree to report to the Office of Financial Assistance any increase in salary and/or income and any other circumstance, which may affect my eligibility for this program.

I authorize the Account Resolution Office to release my Perkins repayment history for the purpose of calculating my debt forgiveness.

If I am selected as a recipient, I authorize Pepperdine University School of Law to use my name in promotional information, press releases, news articles, brochures, and catalogs.

Applicant's Signature

Date

Spouse's Signature

Date

PEPPERDINE UNIVERSITY SCHOOL OF LAW

Employer Certification Form

PART A: TO BE COMPLETED BY THE APPLICANT

INSTRUCTIONS: Please complete Part A, and forward this form to your current and former employer(s).

Name: _____

Social Security Number: _____

I authorize my employer, _____, to provide the information requested in Part B to Pepperdine University School of Law.

Applicant's Signature

Date

PART B: TO BE COMPLETED BY THE APPLICANT'S EMPLOYER

INSTRUCTIONS: The above named individual has applied to the loan repayment assistance program at Pepperdine University School of Law. The application requires employer certification of the individual's current and prior employment status. Please complete the following information, attach a copy of the job description for this position, and return it to our office no later than **January 9, 2015**. If you have any questions, please contact Pepperdine University School of Law Office of Financial Assistance at (310) 506-4633.

The above named individual is a _____ current _____ former employee. (please check one)

Date employment began/will begin: _____

Date employment ended (if applicable): _____

Employment Status: Full time: Yes No (please circle one) Part time: Yes No (please circle one)
Leave of Absence: Yes No (If yes, give dates _____)

Gross annual salary: _____

Is a JD degree required for this individual's position? ____ Yes ____ No

Employer is a ____ federal, state, or local government agency
____ private, non-profit agency qualifying for tax exemption under IRS
Code 501 (c)(3) or 501 (c)(4) *You must provide proof of tax-exempt status.

Print Name

Title

Signature

Date

Telephone Number

PEPPERDINE UNIVERSITY SCHOOL OF LAW

Loan Information Form

PART A: TO BE COMPLETED BY THE APPLICANT

INSTRUCTIONS: Please complete Part A, and forward this form to the holder of your loan(s).

Name: _____ Social Security Number: _____

Address: _____

City, State, and Zip Code: _____

I authorize the holder of my educational loan(s), _____, to provide the information requested in Part B to Pepperdine University School of Law.

Applicant's Signature

Date

PART B: TO BE COMPLETED BY THE HOLDER OF THE APPLICANT'S LOAN(S)

INSTRUCTIONS: The above named individual has applied to the loan repayment assistance program at Pepperdine University School of Law. The application requires documentation of the applicant's loan amounts and repayment history. Please complete the following information, and return it to our office no later than **January 9, 2015**. Other forms of computer generated loan information reports are acceptable, provided that they include all required information.

LOAN INFORMATION:

Loans borrowed by the above named applicant are listed below.

LOAN DATE	ORIGINAL AMOUNT	OUTSTANDING PRINCIPAL	INTEREST RATE	LOAN PROGRAM
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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Loan Information Form

LOAN INFORMATION (Continued):

Loans borrowed by the above named applicant are listed below.

LOAN DATE	ORIGINAL AMOUNT	OUTSTANDING PRINCIPAL	INTEREST RATE	LOAN PROGRAM
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

ACCOUNT PAYMENT INFORMATION

PAYMENT DATE	DESCRIPTION	AMOUNT	AMT. APPLIED TO PRINCIPAL	AMT. APPLIED TO INTEREST	AMT. APPLIED TO LATE CHARGES
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

CURRENT ACCOUNT INFORMATION

NUMBER OF LOANS	PRINCIPAL BALANCE	ACCRUED INTEREST	TOTAL BALANCE
_____	_____	_____	_____

Certifying Official's Name & Title

Lender Name and Address

Signature

Lender Telephone Number