



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

**2020-2021**

**Self-Qualifying Questionnaire and Eligibility Estimate**

Applicant: \_\_\_\_\_ SSN: \_\_\_\_\_  
(print name)

Qualifying Criteria:

- |                                                                                                                                                                                                                                              |     |    |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1. Are you a Pepperdine Law School graduate?<br>Graduation Date _____                                                                                                                                                                        | Yes | No |
| 2. Did you pass the Bar within two years of graduation?<br>Date _____ State _____                                                                                                                                                            | Yes | No |
| 3. Have you been employed by a federal, state or local government agency<br>or by a non-profit organization for at least one-year?                                                                                                           | Yes | No |
| 4. Does this position utilize your law degree?                                                                                                                                                                                               | Yes | No |
| 5. The qualifying individual's income level must not exceed<br>an adjusted gross income of \$75,000 OR the qualifying individual's<br>combined family income must not exceed an adjusted gross income<br>of \$150,000. Is this true for you? | Yes | No |
| 6. Do you have outstanding educational loans that were borrowed to<br>finance studies at Pepperdine Caruso School of Law? Are these<br>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<br>Union Rescue Mission? If so, please explain the work experience. If not, please<br>explain what type of work experience you obtained.               | Yes | No |
| 9. You are aware that you may only apply for loan assistance through Pepperdine<br>Caruso Law for a maximum of ten (10) years.                                                                                                               | 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 should be returned to:

Pepperdine Caruso Law  
Office of Financial Assistance  
ATTN: Berenice Hernandez  
24255 Pacific Coast Highway  
Malibu, CA 90263-4633



**The application deadline is April 15, 2021**

**I. PERSONAL DATA**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

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 (2019), including all schedules, wage earning statements (W-2) and any miscellaneous taxable income reported on form 1099) for tax year 2019.

**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 Caruso School of Law, or loans made by the Caruso School of Law shall be considered.

**Loan Information**

**ATTACH LOAN STATEMENTS**

**INSTRUCTIONS:** Attach copies of the following documents to this application:

Y Most recent monthly billing statement for each lender.

Y History of payments made in the last year (January- December 2020).

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:  
**April 15, 2021.**

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, Caruso 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



## **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: \_\_\_\_\_

I authorize my employer, \_\_\_\_\_, to provide the information requested in Part B to Pepperdine University Caruso 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 Caruso 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 **April 15, 2021**. If you have any questions, please contact Pepperdine University Caruso 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 \_\_\_\_\_