PRE-APPLICATION INFORMATION SHEET

The LIPP Online Application must be completed in one sitting. You CANNOT save it and come back. Following is a list of the information you will need to include in the application which you may not know immediately and will need to gather in order to complete the form.

Part 1: Demographic Information
- Harvard ID number
- Childcare arrangements and expenses
- NEW APPLICANTS: Original balances on ALL education loans
- NEW APPLICANTS: Summer of undergraduate debt (school, lender, original balance, current balance and required monthly payments)

Part 2: Employment and Income Information
- Start date, annual salary, and effective date of annual salary
- Spouse start date, annual salary, and effective date of annual salary
- Additional income information (other taxable income, untaxed income, etc.)
- If you are receiving a fellowship, the amount of fellowship money broken down by Jan-Jun or Jul-Dec periods
- Taxability of fellowship money
- Other loan repayment assistance amounts and taxability

Part 3: Asset Information
- Amount of cash or savings (broken down by participant, spouse, and jointly held)
- Investments (broken down by participant, spouse, and jointly held)
- Vested amounts in retirement plans (broken down by participant, spouse, and jointly held)
- Home Value, Debt, purchase year, and purchase price
  * Please note: LIPP does not consider automobiles an asset!

Part 4: Educational Debt
- Current balance and required monthly payment amounts for all the loans you want covered by LIPP
- Spouse current loan balances and required monthly loan payments
- Forbearance and/or deferment information

Part 5: Special Disbursement Request
- FOR PARTICIPANTS WHO ARE ABROAD ONLY: Bank Name, ABA#, Bank Address, Bank Account #, and Name(s) on Account for wire transfer

Part 6: Information Release

Part 7: Additional Document Requirements

Part 8: Certification