



Frequently Asked Questions

1. Q: How do I claim my Educational Trust Award from California GEAR UP?
A: Students must have graduated from high school and have enrolled in a postsecondary institution within **one** year after high school graduation. Students, along with their financial aid office must complete a Qualified Funds Withdrawal Form (QFWF) and submit it to the California Student Aid Commission (Commission).
2. Q: How long does the process take to receive my check?
A: Once a student's QFWF has been processed, it takes approximately 4-6 weeks for a check to be received at the student's school. **Students do not receive a check.**
3. Q: Where should I mail my QFWF?
A: California Student Aid Commission
GEAR UP
P.O. Box 419029
Rancho Cordova, CA. 95741-9029
4. Q: How can I find out if my school received my check?
A: The Commission will send an e-mail notifying students when their checks have been mailed to their schools. The e-mail notifies students to inquire at their school 2-3 weeks later regarding receipt of their California GEAR UP check.
5. Q: How long do I have to claim and use my award?
A: An awardee must graduate from high school (or the equivalent) and enroll in college within one year (12 months) of their high school graduation. However, a student has six years after high school graduation to use the entire amount of their award.
6. Q: Can students request an amount less than the total balance?
A: Students can request the total balance or any portion of the balance of their award.
7. Q: What is an eligible institution?
A: A postsecondary institution is an eligible institutions participating in Federal Title IV student financial aid programs.
8. Q: Do I have to enroll in a four-year school?
A: No, you can attend a community college, vocational, or proprietary school.
9. Q: Do I have to attend a college in California?
A: No, you do not have to attend a college in California.
10. Q: Who should I contact if I have questions about my award?
A: Please contact the California State GEAR UP Program at gear-up@csac.ca.gov or at 916-479-6742.



GEAR UP EDUCATION TRUST ACCOUNT QUALIFIED FUNDS WITHDRAWAL FORM (QFWF)

Use this form to request withdrawal of funds from your GEAR UP Educational Trust Account to pay for your qualified higher education expenses (see Qualified Withdrawal Guidelines on reverse). You may request a withdrawal amount up to the total balance of your account.

I. Student Information and Signature

Print all information clearly to facilitate timely processing of your request.

Name Sokbrany Yourk SSN 605-96-2629

Address 827 1/2 Alamitos Ave City Long Beach State CA Zip 90813

Phone Number (562) 810-2963 Email syourk97@gmail.com

WITHDRAWAL AMOUNT: ☒ Entire Account Balance OR ☐ Partial Withdrawal - Amount \$ _____

You may want to consult with the Financial Aid Advisor at your college regarding the amount of withdrawal

Circle One: Have you filed the FAFSA? **Yes** No (If no, you may file online at www.fafsa.ed.gov)

Print date of high school graduation June 2015

Print name, city and state of high school last attended Long Beach Polytechnic High School

Long Beach, CA 90813

I certify that I have received a high school diploma or its equivalent. I authorize the college listed above to release the information requested regarding my financial aid status and other information concerning my eligibility for this withdrawal.

Student Signature

8/16/17

Date

II. To Be Completed By College Official

I certify that the student indicated above is enrolled in a minimum of one class.

Signature of College Official _____ Printed Name & Title _____

College Name _____ Address _____ City _____ State _____ Zip _____

(_____) _____

Phone Number _____ Email Address _____

To ensure accurate mailing, indicate the contact name to whom the GEAR UP check should be directed and, if different than above, the campus location (i.e., Financial Aid Office, Scholarship Office, etc.) and address.

College Contact Name, Title _____ Campus Location _____

Address _____ City _____ State _____ Zip _____

(_____) _____

Phone Number _____ Email Address _____

Qualified Withdrawal Guidelines

Qualified Eligible Educational Expenses: Tuition, fees, room and board charges under certain circumstances, and the cost of books, supplies and equipment required for the enrollment and attendance at an Eligible Educational Institution. Certain expenses do not apply including: commuting/travel expenses, clothing, incidental items, computer equipment and software unless explicitly required by the Eligible Educational Institution for your course of study.

An Eligible Educational Institution is a post-secondary school that participates in federal student aid programs under Title IV of the Higher Education Act of 1965. If you are not sure if your school is eligible please contact them.

Room and board expenses: You must be enrolled in a degree or certificate-granting program. For students living at home with parents, as well as students not living in campus-provided housing, the Eligible Educational Institutions "cost of attendance" allowance for federal financial aid purposes will be the room and board amount treated as a qualified expense. For students living on campus, the amount of room and board treated as a qualified expense can be the actual amount charged to the student, if it is greater than the "cost of attendance" allowance.

Refunds: If an Eligible Educational Institution refunds any part of the Qualified Withdrawal to you, the earnings portion of the withdrawal (anything over the initial \$2,000 award) may be considered a Non-Qualified Withdrawal that is subject to the 10% federal additional tax unless the refund has been used for other qualified higher education expenses.

Federal and State Tax on Qualified Withdrawals: The earnings portion of Qualified Withdrawals are not subject to a 10% federal additional tax nor are they subject to federal income tax. The earnings portion is subject to California income tax.

State of California Information Practices Act (IPA) of 1977 & Use of Your SSN

State as well as federal law protects the individuals' right to privacy in information pertaining to oneself. The State of California IPA of 1977 requires that the following information be provided to applicants for financial aid who are asked to supply information about themselves. The principal purpose for requesting information on this form is to determine your eligibility for financial aid. Maintenance of this information is authorized by the Commission policy and the policies of the postsecondary institutions to which you are applying for aid. Furnishing information requested on this form is mandatory. Failure to provide such information will delay and may even prevent your receipt of financial assistance. Information furnished on this form may be transmitted to the state and federal governments if required by law. Individuals have the right of access to records established from information furnished on this form as it pertains to themselves. The official's responsible for maintaining the information contained on this form is the Director of the Commission and the financial aid administrators at the institutions to which you are applying for financial aid.

The social security number is used to verify your identify under record-keeping systems established prior to January 1, 1975, pursuant to authority of the Commission, The California State University, and the California Community Colleges contained in Title 5, California Administrative Code Section 41201, and authority of the Regents of the University of California under Article IX, Section 9 of the California Constitution.

The Commission and California public postsecondary education institutions, in compliance with federal statutes and the Equal Protection Clause of the California Constitution, do not discriminate on the basis of race, color, national origin, sex or handicap in any of their policies, procedures, or practices. Inquiries regarding these equal opportunity policies may be directed to the Commission and to the financial aid office of the school or college to which you are applying for aid.

Return this form to:

California Student Aid Commission

GEAR UP

P.O. Box 419029

Rancho Cordova, CA 95670

Fax Number: (916) 464-6499

Email: Gear-Up@csac.ca.gov

**CALIFORNIA GEAR UP
EDUCATION TRUST ACCOUNT
CHANGE OF ADDRESS FORM**

California GEAR UP needs to have your current address at all times in case we need to contact you. If you ever move, change your phone number or update your email address, please make sure to let us know. Keep this form and fill it out, when you need to, and return it to California GEAR UP at the address in the box below, so that we can update your file.

Please Print:

Awardee's Name: Sokbrany Yourk SSN: 605-96-2629

New Address: 827 1/2 Alamitos Ave

City, State, Zip Long Beach, CA 90813

Phone Number (562) 810-2963 Email syourk97@gmail.com

If your parents or guardians have a different address from the one you listed above, please give us the following information. (**Please Print**):

Parent or Guardian's Name _____

Address: _____

City, State and Zip: _____

Phone Number (_____) _____ Email _____

Return this form to:
California GEAR UP
Education Trust Award Program
6300 Ehrhardt Avenue, Rm D2
Sacramento, CA 95823
(916) 479-6742/Gear-Up@csac.ca.gov