



INSTRUCTIONS

Please read all provided instructions, and then complete and submit the following (3) documents together to the Student Accounts Office (submission instructions are at the bottom of this page):

- TIER Promissory Note (4 pages)
- Statement of Rights & Responsibilities (2pages)
- Student Loan Worksheet (2 pages)

Because you are entering into a legal and binding student loan repayment agreement, all information requested is required without exception. The most common mistakes made on these forms are:

- Answering Worksheet questions with, “N/A” (this is never an acceptable response);
- Leaving a Worksheet line blank; and
- Illegible writing, or completing and signing in pencil.

The two page Student Loan Worksheet must be completed with *acceptable responses*. Please use the information provided below as a guide:

BORROWER INFORMATION:

- All requested information is required except cell and pager information. However, including it is recommended, as it can help in our efforts to keep your account current.
- The complete Social Security Number is required on each document.
- We would prefer that you provide your personal email address on this document, not your Cal Poly assigned email address. However, if you do not have a personal email address, please provide the Cal Poly assigned address.
- If you do not have a local address, you may answer “same as permanent address” in the local address section.

SPOUSAL INFORMATION:

- If you answered “yes” to question (3), please complete this section. Otherwise, leave it blank.

BORROWER’S PARENTAL INFORMATION:

- No matter your age, unless a parent is deceased, or you have no contact, this information is required (do not leave the line blank. Please respond with *Deceased, No Contact, Ward of the Court*, etc.). Your parents will never be expected to repay your loan. The information is used for contact purposed only (if we cannot reach you at an address you have provided, we will contact the parent for assistance).
- If your parents are divorced, you still need to reference both.
- Please refer to the *Employer Responses* section for additional information.

SPOUSE’S PARENTAL INFORMATION:

- If you are not married you may leave this section blank. Otherwise, the information is required. Please refer to the Borrower’s Parental Information section (above) for assistance.

REQUIRED REFERENCE INFORMATION:

- All references must be at least 18 years of age; reside in the United States; and have a home address & 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 or phone number as you, your parents, or other references listed.
- If the reference is attending college (other than Cal Poly), please use the reference’s permanent home address, NOT the school address.
- References CAN have the same employer.

EMPLOYER RESPONSES:

- If employed, all information is required.
- If a student, indicate school of attendance.
- If unemployed, please indicate.
- If self-employed, please indicate – and include cell phone #.

DO NOT:

- **Do not** leave a line blank, unless instructed to do so.
- **Do not** sign any document in pencil.
- **Do not** use “N/A” on any line.
- **Do not** cross through a line.
- **Do not** forget the zip codes.

APPLICATION SUBMISSION INSTRUCTIONS:

- You are required to submit original documents. You may do so by handing them in, or mailing them to, the Student Accounts Office (address provided at the top of this form).



TIER Program STUDENT CONTRACT

7 Pages

Cal Poly School of Education
Teaching for Inclusivity and Equity Residency (TIER)

For Internal Use:

Loan Amount
Anticipated \$
Award Year

A grant from the United States Department of Education (Award #U336S20007 granted to Cal Poly Corporation) makes it possible for California Polytechnic State University, San Luis Obispo (hereinafter "University") to provide a Teacher Quality Partnership Program – Cal Poly TIER: Teaching for Inclusivity and Equity Residency (TIER) Program scholarship up to \$27,000 to individuals who have been admitted to the Program and are obtaining one of the following;

- An Elementary or Secondary teaching credential, a Spanish Bilingual Authorization and a Master’s degree in Curriculum and Instruction
• A Special Education teaching credential (mild/moderate disabilities) and a Special Education Master’s degree
• A Special Education teaching credential (mild/moderate disabilities), a Special Education Master’s degree and a Spanish Bilingual Authorization

LETTER OF AGREEMENT AND PROMISSORY NOTE

THIS AGREEMENT is between California Polytechnic State University, San Luis Obispo and Student ... (hereinafter "Teacher Resident") and is entered into on

By entering into this Agreement, the Teacher Resident attests to the following:

- 1. Their intent to participate in the Cal Poly TIER, Residency Program (hereinafter "Program") made possible through a Teacher Quality Partnership grant funded by the United States Department of Education.
2. Their acceptance in pursuit of a full-time 12-18-month course of study in education at California Polytechnic State University, San Luis Obispo leading to a teaching credential and a Master’s in Education degree.
3. I, the undersigned Teacher Resident, for value received, understand and agree that unless I fulfill the terms and conditions of this Letter of Agreement and Promissory Note, which I have entered into with the University, I am obligated to repay the principal sum ("Grant") in full, together with any and all charges that may become due as provided in this Letter of Agreement and Promissory Note.
4. I understand that the distribution of the grant is as follows: Teacher Resident will receive up to \$27,000 total for a maximum of 3 quarters while in the program contingent upon good academic standing, satisfactory program progress including teacher performance and meeting credential & Master’s degree timelines, and upon availability of Teacher Quality Partnership funds. Disbursements will be scheduled as follows:

Table with 3 columns: Disbursement, Quarter, Amount. Rows: Disbursement 1: Fall quarter, \$9,000.00; Disbursement 2: Winter quarter, \$9,000.00; Disbursement 3: Spring quarter, \$9,000.00

- 5. I understand if I enter repayment on this scholarship I will be required to repay the full scholarship with interest, and that this interest will accrue at a rate of 5% once the loan enters repayment."



OBLIGATIONS OF THE TEACHER RESIDENT

SECTION I – COURSE WORK REQUIREMENTS

I understand that to retain eligibility to participate in the Program, I must:

1. Be continuously enrolled in the University and maintain satisfactory academic progress in the Program, including but not limited to meeting GPA requirements in all education course work.
2. Complete coursework and training necessary to obtain a teaching credential and a Master’s degree in Education.
3. Not to be in default on any Federal student loan
4. Be eligible to receive federal aid funding or have verified DACA status

I understand and agree that failure to comply with items 1, 2, or 3 of Section I will result in ineligibility for the Program. If I become ineligible, the Grant funds will be reversed (refunded) to the University. After the Grant is reversed, I will be responsible for paying all University charges (tuition, fees, etc.)

SECTION II – TEACHING COMMITMENT

I must:

1. Begin the first school year of eligible full-time teaching service in a *partner* school, served by a high-need Local Education Agency (LEA) in the eligible partnership within six (6) months from the date I receive my teaching credential. If I am unable, within 6 months of graduation, to find a qualifying position in a *partner* high need school district, I will be allowed to accept a position in a qualifying and approved high need school district outside of the eligible partnership.
2. Teach on a full-time basis for a minimum of (3) complete academic years in an approved high-need school, beginning within 6 months of successful completion of the Cal Poly TIER Residency Program.
3. Perform consecutive teaching years once I begin my teaching service until my obligation is fulfilled.
4. Provide to the eligible partnership a certificate from the chief administrative officer of the high-need LEA in which the I am employed, documenting the employment required.

I understand and agree that failure to comply with any item (1, 2, 3, 4 or 5) of Section II will result in a requirement to repay the Grant funds received.

SECTION III – MONETARY REPAYMENT OBLIGATION

Each recipient of a scholarship who does not complete, or who notifies the partnership that they intend not to complete, the service obligation required will be required to repay the scholarship and any and all interest and fees incurred to Cal Poly University.

Other terms and conditions specified by Cal Poly TIER will include reasonable provisions for pro-rata repayment of the scholarship or for deferral of a teaching resident’s service obligation on grounds of health, incapacitation, inability to secure employment in a school served by the eligible partnership or in another approved high-need school, being called to active duty in the Armed Forces of the United States, or other extraordinary circumstances.

If Teacher Resident does not graduate because of termination of enrollment from the University for any reason, or if Teacher Resident leaves the Program for any reason, Teacher Resident will pay the Cal Poly University or its fiscal agent an agreed-upon amount each month, to total the sum of all amounts received as support, together with all attorney’s fees and other costs and charges necessary for collection. Payment will begin no later than the sixth calendar month following the date of termination of



enrollment. The period of repayment shall be determined by Cal Poly University but is not to exceed three (3) years.

1. If Teacher Resident declines appropriate employment, fails to qualify* for appropriate employment, is discharged from employment under application rules or policies, or if unsatisfactory work performance** results in termination prior to completion of the employment requirement, Teacher Resident agrees to repay any support and costs incurred by Cal Poly University or its fiscal agent in securing repayment.

Failure to qualify includes failing the interview, and/or criminal clearances.

** Unsatisfactory work performance includes, but is not limited to:

- Inadequate professional performance;
 - A felony conviction during Program participation and/or employment obligation period;
 - Conviction of a crime involving harm to children;
2. Should repayment not be received in a timely manner, Cal Poly University or its fiscal agent may undertake, but is not limited to, the following measures: 1) Place a hold on student account to block any future enrollment, 2) Intercept Teacher Resident's/Graduate's tax returns and apply funds toward any amounts owed, 3) Report delinquent repayment status to available credit bureaus, and 4) Institute legal proceedings seeking all available remedies.
 3. All collection costs are determined by the Student Accounts Office then in effect.

If I fail to complete my teaching commitment, I shall:

1. Repay the amount of the scholarship award received according to the portion of the teaching obligation not completed based on the following schedule:

Time Employed in a High-Need School	Amount to Repay
Does NOT teach in an eligible school OR Taught less than one (1) year in an eligible school	Total scholarship received
Taught at least one (1) year, but less than two (2) years, in an eligible school	Two-thirds of the total scholarship dollars received
Taught at least two (2) years, but less than three (3) years, in an eligible school	One-third of the total scholarship dollars received
Taught ALL three (3) years in an eligible school	-0-

2. Contact the Cal Poly TIER Office to set up a repayment schedule once I do not fulfill my teaching commitment.
3. Enter repayment status and begin repayment on the fifteenth day of the first calendar month after
4. the (1) the University has determined a default or, (2) the University is notified that I will be unable or unwilling to fulfill the teaching commitment as described in Section II of this Agreement.
5. Make payments to the University according to the schedule established by the University, which requires complete repayment within three (3) years after I enter repayment status.
6. Be required to make a minimum monthly payment of at least fifty (\$50) dollars. The minimum annual amount to be repaid will be the lesser of six hundred (\$600) dollars or the unpaid balance. The repayment schedule will be based on the amount of the scholarship to be repaid, as determined by the University. I understand that my monthly and annual repayment may be higher than the minimums stated in this section to ensure the scholarship is repaid within three (3) years, as required.

Agree that if I fail to repay the scholarship as stated in this Agreement, I may have to pay reasonable collection costs, including but not limited to attorney's fees, court costs and other fees



INTERRUPTION OF STUDIES OR DELAY OF GRADUATION

If Teacher Resident interrupts studies or delays graduation, Teacher Resident shall notify the Cal Poly TIER Office and either:

1. Request a deferral due to hardship or disability that defers completion of studies for no more than one year. The University may defer Program completion and employment obligation in its discretion.

OR

2. Repay support received according to University repayment procedures.

INTERRUPTION OF EMPLOYMENT OBLIGATION, STUDENT HARDSHIP, DISABILITY OR DEATH

If Teacher Resident interrupts fulfillment of the employment obligation due to hardship or permanent disability, Teacher Resident shall notify the University and request deferral of employment obligation completion.

With written application by Teacher Resident or Teacher Resident's legal representative, the University may, in its discretion, waive the employment repayment obligations in the case of Teacher Resident's death, disability or serious hardship.

Based upon sufficient evidence to substantiate the grounds, the University may grant an exception to the repayment requirement if the Teacher Resident:

- Is unable to continue the course of study or perform the service obligation because of a permanent disability or hardship; or
- Has died.

Based upon sufficient evidence to substantiate the grounds, the University may, in its discretion, grant a deferral of the repayment requirement during the time the Teacher Resident:

- Is engaging in a full-time course of study at an institution of higher education;
- Is serving on active duty as a member of the armed services of the United States;
- Is serving as a volunteer under the Peace Corps Act; or
- Is serving as a full-time volunteer under Title I of the Domestic Volunteer Service Act of 1973.

EVALUATION ACTIVITIES

The Cal Poly TIER, Residency Program, funded by the Teacher Quality Partnership grant, is charged with evaluating the effectiveness of student achievement over time and is required to conduct evaluation activities. The current expectation is that Teacher Residents/Graduates will be contacted initially for Program evaluation purposes approximately each year following graduation for a period of 3 years and at other times during and after completion of the employment obligation. Consequently, Teacher Residents/Graduates agree to participate in these mandated evaluations in the following ways:

- Provide the University and its contracted outside evaluators with permanent and updated contact information.
- Consent to be contacted by the University and/or contracted outside evaluators for the purpose of conducting reasonable evaluation efforts related to the TIER program, including follow-up surveys that assess project and graduate effectiveness. Any personal data collected will be coded and reported in aggregate form only, and every reasonable effort will be made to safeguard Teacher Resident's privacy, consistent with applicable state law.
- Give permission for data to be collected during and after completion of the TIER Program, as well as from their employers for up to three years following graduation.



SECTION IV – ADDITIONAL REQUIREMENTS

I must:

1. Respond to all communications and requests from the Residency Program within the time indicated provide written notification to the Residency Program within sixty (60) calendar days of any change in my legal name or address, including email address, or of any change in the status affecting my eligibility.
2. Comply with any procedures deemed necessary and appropriate by the University, all conditions cited in this Agreement, and all applicable rules and regulations.

SECTION V – APPEALS

Once I have been accepted to participate in the Program, I may appeal any determination of non-compliance within any provisions of the Program in the following manner:

1. Provide a written notice of appeal, which includes a concise statement of the action being challenged and the basis for my appeal.
2. The notice of appeal must be sent within thirty (30) calendar days from the date of the
3. University's letter stating the decision being challenged.
4. Direct appeals shall be sent to the following individuals, in the following order:
 - a. The Credential or Masters Program Coordinator
 - b. Director, School of Education
 - c. Dean, College of Science and Mathematics
5. All appeals will be reviewed by the above individuals under University Policy, including requests for special consideration.
6. Response to the appeal will be delivered to the Teacher Resident via email within (90) calendar days of receipt.

SECTION VI – EXIT COUNSELING

Before I complete the Program, or withdraw from the University, the University will provide me an opportunity to review fully the terms and conditions of this grant with a representative from the Student Accounts Office.

SECTION VII – TAXES

This scholarship may have tax consequences. Please consult your tax professional.



ADDITIONAL LEGAL TERMS

1. **Waiver.** Any failure of the University at any time, or from time to time, to enforce or require the strict keeping and performance by Teacher Resident/Graduate of any of the terms or conditions of the Agreement shall not constitute a waiver by the University of such a breach of any such terms or conditions and shall not affect or impair such terms or conditions in any way, or the right of the University at any time to avail itself of such remedies as it may have or any such breach or breaches of such terms or conditions.
2. **Severability.** In the event any portion of this Agreement is declared void by court of competent a. jurisdiction, such portion shall be severed from this Agreement, and the remaining provisions shall remain in effect, unless the effect of such severance would be to substantially alter the Agreement or obligations of the parties, in which case the Agreement may be immediately terminated.
3. **Whole Agreement and Amendments.** This Agreement contains the entire agreement between the Parties and shall not be modified, amended, or supplemented, or any rights herein waived, unless such amendment or modification to this Agreement is (i) in writing; (ii) refers to this Agreement; and (iii) executed by an authorized representative of each Party.
4. **Subject to Funding.** Scholarships are not guaranteed. University's fulfilment of scholarships and the amounts thereof are subject to available funds provided for the Program from the award from the United States Department of Education.
5. **Governing Law.** This Agreement shall be construed in accordance with and governed by the laws of the State of California and venue shall be within the State of California for any actions arising under this Agreement.

SECTION VIII – LEGISLATIVE ACTION

If the statutory authority for the Teacher Quality Partnership Program, including authority for funding, is repealed, amended, or significantly modified, either by legislative action or the administrative action of the federal agency that administers the Teacher Quality Partnership Program, the University may modify this Agreement accordingly. In such event, the University will provide written notification of such changes.



AFFIRMATION AND RELEASE OF INFORMATION

I hereby attest that I have never been convicted of a felony or misdemeanor crime that would disqualify me from employment as a credentialed teacher in a public school district or county.

I acknowledge that I have read and understand the above information and that I am required to fulfill my academic and teaching obligation according to the terms and conditions herein.

In accepting the Cal Poly TIER scholarship, I hereby agree to adhere to the provisions of this Agreement.

First Name	Middle Name	Last Name	SSN/ITIN Number:
Maiden Name, if applicable			
Cal Poly Email Address:		Secondary Email Address:	
Primary Mailing Address:			
City	State:	Zip Code:	
Phone			

Signature of TIER Teacher Resident

Print Full Name	Signature	Date
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Received by:	
Date:	
Approved by:	
Date:	
Scholarship Awarded:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Comments:	

Original kept with the University. Copy of signed, executed contract given to Teacher Resident.



STATEMENT OF RIGHTS & RESPONSIBILITIES

2 Pages

TIER Loan Lender:

California Polytechnic State University
Student Accounts Office
Administration Bldg., Room 211
San Luis Obispo, CA 93407
(805) 756-1428

TIER Loan Billing Service:

ECSI
100 global view dr.
Warrendale, PA 15086
(888) 549-3274
www.ecsi.net or cservice@esci.ne

I understand that (please initial each line item):

- _____ 1. The TIER Residency scholarship/stipend funds are being awarded to me as a forgivable loan. If I do not satisfy the academic and service requirements as outlined in my Promissory Note I will be required to repay the TIER funds, plus any and all associated interest and fees.
- _____ 2. I will be required to begin repaying the TIER Residency scholarship funds awarded within thirty-one days of failing to satisfy the requirements of the academic program for which the funds were awarded. The academic requirements include: 1) Maintaining at least half-time enrollment each term with a GPA of at least 2.7 until graduating from the academic program; 2) Graduating from the academic program for which the TIER funds were awarded; and 3) Successful participation in all semi-annual and annual submission of demographic/employment/education related survey information associated with the TIER Residency scholarship/stipend program: a) During my continued enrollment in my academic program; and b) And after graduating from the academic program.
- _____ 3. If I fail to meet the academic and/or survey requirements of the TIER Residency scholarship/stipend program for which the funds were awarded, I automatically forfeit the cancellation benefit, and all TIER funds that were disbursed to me are due and payable according to the terms of my Promissory Note.
- _____ 4. I have six years beyond graduating from the academic program for which my TIER Residency scholarship/stipend funds were awarded to satisfy the service requirement. The service requirement consists of working as a teacher as outlined in my Promissory Note, with one year’s TIER Residency scholarship/stipend award being cancelled (forgiven) for every 3 years of teaching service. I am responsible for successfully submitting proof of teaching before the teaching period and immediately following the teaching period – for every year of teaching. I understand that the TIER Annual Employment & Contact Update form is available on the School of Education website. TIER Residency scholarship/stipend funds not cancelled within the six year window must be repaid. Repayment will commence 6 years and thirty-one days after I graduate from the academic program for which the funds were awarded.
- _____ 5. Cal Poly and/or its billing service DOES report all repayment information to at least one major credit bureau. Accurately reported information is NOT negotiable, even after the loan has been paid in full.
- _____ 6. If I am expected to repay the TIER Residency scholarship funds. I understand that there is never a prepayment penalty. I may make payment in excess of the amount expected at any time. Unless otherwise notified, any amounts received in excess of the amount expected will be applied to the principal balance and WILL NOT take the place of my regularly scheduled payments.
- _____ 7. In my last quarter of half time enrollment (undergrad = 6 units and grad = 4 units) I must arrange for my REQUIRED student loan exit interview. I will do so by accessing the Student Accounts Office web page: http://www.afd.calpoly.edu/Student_Accounts/ (click on Student Loan Information). Failure to complete the exit



interview process as requested will result in Cal Poly withholding services until the loan is paid in full, or the exit interview process is completed – whichever comes first.

- 8. My loan may be subject to late fees of up to 20% of the past due installment.
- 9. I must, without exception, notify the billing service, ECSI, and Monitors within 10 days if
 - a) I withdraw from Cal Poly;
 - b) my name should change (I will need to provide verification of the change) ;
 - c) I drop below half time units;
 - d) my billing address and/or phone number should change (do not rely on the Post Office’s Address Change form, CONTACT THE BILLING SERVICE DIRECTLY); or
 - e) I think I’m eligible for a deferment or forbearance (forms should be requested and eligibility determined by the billing service, ECSI: www.ecsi.net.)
- 10. ECSI will attempt to notify me with information related to my disbursements; my exit interview requirement; and loan repayment information. I understand that it is my responsibility – even during enrollment at Cal Poly – to maintain a current address and phone number on my ECSI loan account: www.ecsi.net.
- 11. If I fail to pay my loan as agreed, I will no longer have access to Cal Poly services (records & enrollment); my loan will be assigned to a collection agency, and may be accelerated (loan balance due and payable IN ITS ENTIRETY); all loan benefits will no longer be available to me; and I will be required to pay all collection, court, and attorney’s fees if my loan becomes, or continues to be, past due.
- 12. If I allow my loan to be more than 90 days past due, it will be considered in default, and such a status may compromise my ability to receive future Title IV funds, or additional institutional loan funds, through Cal Poly, SLO, until such time as the defaulted loan is paid in full. Further, Cal Poly, SLO will withhold all services until such time as the loan is paid in full.
- 13. I am expected to contact the billing service, ECSI, BEFORE THE DUE DATE, if I cannot make my payment on time. Cal Poly will withhold all services until my delinquent (late)/defaulted loan account has been brought current and/or paid in full.
- 14. I understand that whether or not I receive my monthly billing statement, my payment is due on time. I further understand that I am expected to promptly answer all communications – written or otherwise – from Cal Poly and/or ECSI.
- 15. I authorize Cal Poly access to any and all of my demographic, contact, enrollment, and employment information from any third party for purposes of enforcing the terms and conditions of any TIER Residency Scholarship/Stipend repayment obligation I might incur.

I attest that I have read and understand my repayment responsibilities and the options available to me. As outlined in the Promissory Note, I understand that if I do not fulfill the TIER Residency academic and service requirements, the TIER scholarship funds disbursed to me will convert into a loan that must be repaid. This loan must be repaid in a timely manner as called for in my Promissory Note. The payment terms associated with this loan program were mutually agreed upon between me and my lending institution, Cal Poly, San Luis Obispo.

In signing below I acknowledge that I have printed out an exact copy of this form, and that said copy will be considered the “recipient’s copy”.

Print Full Name _____ Signature _____ Date _____ Social Security Number _____



TIER Program WORKSHEET - 2 pages

COMPLETE BOTH PAGES OF THIS WORKSHEET AND SUBMIT WITH SUPPORTING DOCUMENTS (SEE INSTRUCTIONS PAGE ONE)

BORROWER INFORMATION:

1. NAME: FIRST			MIDDLE	LAST	2. DATE OF BIRTH: (MO/DAY/YEAR)				
3. MARTIAL STATUS: <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED			4. SOCIAL SECURITY NUMBER			5. DRIVER'S LICENSE OR STATE ID STATE: NUMBER:			
6. LOCAL (SCHOOL) ADDRESS. IF YOU DON'T HAVE ONE YET, COMPLETE PERMANENT ADDRESS ONLY.				7. PERMANENT MAILING ADDRESS. REFERENCE AN ADDRESS WHERE YOU CAN <u>ALWAYS</u> GET YOUR MAIL					
CITY			STATE	ZIP	CITY			STATE	ZIP
8. REQUIRED PHONE NUMBERS INCLUDE AREA CODES		LOCAL AT SCHOOL () -		PERMANENT () -		WORK () -			
9. MORE REQUIRED INFORMATION:		E-MAIL ADDRESS (<u>PERMANENT</u> , NOT YOUR SCHOOL EMAIL):				CELL PHONE () -			
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? <input type="checkbox"/> NO <input type="checkbox"/> YES			IF "YES" WHERE? NAME, CITY & STATE OF SCHOOL			

BORROWER'S PARENTAL INFORMATION: (REQUIRED)

15. PARENT 1 NAME: FIRST			MIDDLE	LAST	FATHER'S EMPLOYER				
MAILING ADDRESS					EMPLOYER'S MAILING ADDRESS				
CITY		STATE	ZIP	PHONE () -	CITY		STATE	ZIP	PHONE () -
16. PARENT 2 NAME: FIRST			MIDDLE	LAST	MOTHER'S EMPLOYER				
MAILING ADDRESS					EMPLOYER'S MAILING ADDRESS				
CITY		STATE	ZIP	PHONE () -	CITY		STATE	ZIP	PHONE () -



TIER Program WORKSHEET - Page 2 of 2

SPOUSE'S PARENTAL INFORMATION: REQUIRED IF YOU ARE MARRIED; OTHERWISE SKIP TO QUESTION #19

17. PARENT 1 NAME: FIRST			MIDDLE	LAST	18. PARENT 2 NAME: FIRST			MIDDLE	LAST
MAILING ADDRESS			HOME: () -		MAILING ADDRESS			HOME: () -	
CITY	STATE	ZIP	WORK: () -		CITY	STATE	ZIP	WORK: () -	

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

19. 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 and cannot be current Cal Poly staff or students.

1. RELATIVE REFERENCE NAME		HOME: () -	EMPLOYER NAME		EMPLOYER: () -
HOME: MAILING ADDRESS			CITY	STATE	ZIP

2. RELATIVE REFERENCE NAME		HOME: () -	EMPLOYER NAME		EMPLOYER: () -
HOME: MAILING ADDRESS			CITY	STATE	ZIP

20. 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

1. REFERENCE NAME		HOME: () -	EMPLOYER NAME		EMPLOYER: () -
HOME: MAILING ADDRESS			CITY	STATE	ZIP

2 REFERENCE NAME		HOME: () -	EMPLOYER NAME		EMPLOYER: () -
HOME: MAILING ADDRESS			CITY	STATE	ZIP

3. REFERENCE NAME		HOME: () -	EMPLOYER NAME		EMPLOYER: () -
HOME: MAILING ADDRESS			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 if I do not fulfill the academic and service obligations outlined in the promissory note, and that I am required to notify Cal Poly, and the student loan billing service, ECSI, 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



TIER Program SUBMISSION CHECKLIST

Submit all forms to:

Student Accounts Office
Administration Building, Room 211
San Luis Obispo, CA 93407
(805) 756-1428

REVIEW YOUR FORMS BEFORE SUBMISSION

Make sure you review all your forms and submit them together. Incomplete forms will be rejected. The funds will not disburse until the application packet has been successfully submitted to the Student Accounts Office.

TIER Promissory Note (4 page document):

- You must complete items 1 through 5 on the Promissory Note.
- Make sure you read the information provided on the Promissory Note. Let your loan counselor know if you have questions: studentaccounts-loans@calpoly.edu
- Sign and date the Promissory Note. Keep a copy for your records.

Statement of Rights & Responsibilities (2 page document):

- Make sure you read the information on the Statement of Rights & Responsibilities and initial each line item. Let your loan counselor know if you have questions: studentaccounts-loans@calpoly.edu

Student Loan Worksheet (2 page document):

- Make sure you read over the instruction page that is included in this packet.
- Provide all required information and sign and date the bottom of the second page.

TIER Application Packet Submission Instructions:

You must submit your completed forms together:

Promissory Note (4 pages)
Statement of Rights & Responsibilities (2 pages)
Student Loan Worksheet (2 pages)

Original documents are required. Please hand deliver, or mail your completed forms to the Cal Poly Student Accounts Office using the address provided at the top of this form