



## Rebate Application Checklist

- Step 1: Verify Completion of Program Requirements of Gulfline
  - All requirements, except those that pertain to post-graduation, should be checked off as complete
  - This can be accessed by logging into Gulfline, selecting 'Student' → 'Soar in 4' → 'Progress'
  
- Step 2: Complete the Rebate Application Included Below
  
- Step 3: Gather Employment Verification Documentation
  - **If employed by an employer**, you will need to provide two consecutive paystubs as proof of employment
  - **If self-employed**, you will need to submit Articles of Incorporation in the State of Florida and your most recent Tax return and proof that your business meets the qualifications of this program
  - **If enlisted in the U.S. Military**, you will need to attach a fully executed DD Form 4 Enlistment/Reenlistment Document Armed Forces of the United States
  
- Step 4: Gather Appropriate Tax Forms
  - **If you are a U.S. Citizen or Resident Alien**, attach completed and signed [W-9](#) for you as an individual. This form does NOT come from your employer.
  - **If you are a Nonresident Alien**, attach completed and signed [W-8BEN](#) for you as an individual. This form does NOT come from your employer.
  
- Step 5: Mail Your Rebate Application and Supporting Documentation
  - Your completed application packet should include your Rebate Application, employment verification documentation, and the appropriate tax forms
  - This packet must be **mailed** to the following address:

Florida Gulf Coast University  
10501 FGCU Boulevard South  
Edwards Hall 214D  
Fort Myers, FL 33965-6565

**DO NOT EMAIL THIS APPLICATION AS IT CONTAINS YOUR SOCIAL SECURITY NUMBER**



## Soar in 4: Governor's Challenge Rebate Application



Florida Gulf Coast University (FGCU) Regulation PR7.010 authorizes the Governor's Challenge (known as Soar in 4) Rebate for certain students who have graduated from FGCU and have met the eligibility requirements. Complete the checklist below to assure eligibility requirements have been met. Complete the application and attach applicable documents as described in each section of the application.

### What tax form is required for the processing of the rebate?

*U S Citizens and Resident Aliens should complete and submit a Form W-9, Request for Taxpayer Identification Number and Certification. Non-Resident Aliens should complete and submit a Form W-8BEN, Certificate of Foreign Status of Beneficial Owner for United State Tax Withholding and Reporting (Individuals).*

### Will the rebate be subject to federal tax?

*For U S Citizens and Resident Aliens, the rebate will be reported to the IRS on Form 1099-MISC, Miscellaneous Income if the total rebate is in excess of \$600. For Non-Resident Aliens, the entire rebate will be reported to the IRS on Form 1042-S, Foreign Person's U S Source Income Subject to Withholding.*

- You may submit your application upon completion of the below checklist of criteria for eligibility and this application, but no later than one year after graduation date.
- Upon final review by the Office of First Year Experience & Retention Programs, you will either receive your rebate or notification that you are not eligible.
- Processing will take approximately four to six weeks after application is received.
- All correspondence will be mailed to the address specified on the attached Tax Form W-9 or W-8BEN.

Section I: General Student Information	
Student Name	UIN
Phone Number	Permanent E-Mail Address
First Term of Enrollment (Example: Fall 2015)	Graduation Term (Example: Spring 2019)

### Section II: Verification of Requirements

I acknowledge that I have completed the following requirements **AND** they are marked as complete on my Soar in 4 Progress page on Gulfline, which can be accessed by logging into Gulfline, selecting 'Student' → 'Soar in 4' → 'Progress'. **I acknowledge that my application may be denied if any requirement is unchecked.** If any requirement is unchecked, please send confirmation that these requirements have been completed to [soarin4@fgcu.edu](mailto:soarin4@fgcu.edu).

<input type="checkbox"/>	I was admitted as a degree seeking, first-time-in-college (FTIC) student in the Summer 2015 or later.
<input type="checkbox"/>	I selected a major in my first year and graduated from FGCU in four years or less.
<input type="checkbox"/>	I received academic advising offered at FGCU at least once a year, every year.
<input type="checkbox"/>	I participated in internships, co-op work experiences, or other similar opportunities with potential employers.
<input type="checkbox"/>	I utilized FGCU Career Development Services for assistance including: <ul style="list-style-type: none"> <li>• In-person advising (resume preparation, interview techniques, etc.)</li> <li>• Participation in recruitment events hosted by Career Development Services or the Office of Internships &amp; Co-operative Programs.</li> </ul>

Visit the **FGCU Soar in 4: Governor's Challenge** website at [www.fgcu.edu/soarin4](http://www.fgcu.edu/soarin4) for additional information.

### Section III: Supporting Documentation and Verification of Employment

To provide evidence of full-time employment in Florida within six months following graduation, with an annualized salary of \$25,000 or higher, or enlistment in U.S. military, please select and attach the appropriate documentation for your employment status (i.e., employed, self-employed, or enlisted). **Please select one.**

<input type="checkbox"/>	I am employed by an employer, am working full-time (at least 35 hours per week), and am earning at least \$25,000 annually. <b>I will submit two consecutive paystubs as proof of employment.</b> <i>If you selected this option, please complete Section IV of this application.</i>
<input type="checkbox"/>	I am self-employed working full-time and earning at least \$25,000 per year. <b>I will submit Articles of Incorporation in the State of Florida and my most recent Tax Return as proof that my business meets the qualifications of this program.</b> <i>Do not complete Section IV of this application and move directly to Section V.</i>
<input type="checkbox"/>	I am enlisted in the U.S. Military. <b>I will attach my fully executed DD Form 4, Enlistment/Reenlistment Document Armed Forces of the United States.</b> <i>Do not complete Section IV of this application and move directly to Section V.</i>

### Section IV: Employer Information (ONLY COMPLETE IF EMPLOYED BY AN EMPLOYER)

Employer Name	
Employer Address (Address, City, State, Zip Code)	
	<input type="checkbox"/> Hourly Pay <input type="checkbox"/> Annual Salary <input type="checkbox"/> Hourly Pay Plus Other Wages (i.e., tips, overtime, commission) <input type="checkbox"/> Other (please explain):
Start Date	Compensation Form (Select One)

### Section V: Tax Information

Please complete one of the following tax forms to comply with IRS requirements. **Please select one.**

<input type="checkbox"/>	<b>U.S. Citizens and Resident Aliens:</b> The amount of the rebate, if at least \$600, will be included on an IRS Form 1099-MISC, Miscellaneous Income, a copy of which will be mailed to you. <b>Attach completed and signed <a href="#">W-9</a> for you as an individual. This form does NOT come from your employer.</b> (If hyperlink is disabled, the W-9 can be accessed at <a href="https://www.irs.gov/pub/irs-pdf/fw9.pdf">https://www.irs.gov/pub/irs-pdf/fw9.pdf</a> )
<input type="checkbox"/>	<b>Nonresident Aliens:</b> The total amount of the rebate will be included on an IRS Form 1042-S, Foreign Person's U S Source Income Subject to Withholding. Unless there are specific treaty benefits, 30% withholding is required. <b>Attach completed and signed <a href="#">W-8BEN</a> for you as an individual. This form does NOT come from your employer.</b> (If hyperlink is disabled, the W-9 can be accessed at <a href="https://www.irs.gov/pub/irs-pdf/fw8ben.pdf">https://www.irs.gov/pub/irs-pdf/fw8ben.pdf</a> )

### Section VI: To be completed by the Office of the Bursar

<b>Approved by:</b>		
	<b>Signature</b>	<b>Date</b>
<b>Rebate Amount:</b>		
<b>Check Issue Date:</b>		
<b>Check #:</b>		
<b>Notes:</b>		