

Section A – Student’s Information

1. **Student’s Name:** _____
Last Name First Name M.I.
2. **Student’s permanent mailing address:** _____
Street address City

Zip or Postal Code Country
3. **Student’s preferred telephone number:** _____
4. **Title** (optional): Mr. Miss, Ms., or Mrs.
5. **Student’s Date of Birth:** ____/____/____
6. **Student’s Social Security Number:** _____
7. **What will be the student’s year in school during 2017-18?**
 First year (never previously attended college) Fifth year or more undergraduate
 First year (previously attended college) First year graduate/professional (beyond bachelor’s degree)
 Second year Second year graduate/professional
 Third year Third year graduate/professional
 Fourth year Fourth year or more graduate/professional
8. **What is the student’s current marital status?**
 Unmarried (single, divorced, or widowed) Married Separated
9. **Are both of the student’s parents deceased, or is the student (or was the student until age 18) a ward of the court?** Yes No
10. **Does the student have legal dependents (other than a spouse) that fit the definition in the instructions?**
 Yes No
11. **How many people are in the student’s household?** Always include the student (and spouse) if currently married). List their names and give information about them in Section L. See instructions. _____
12. **Of the number in 11, how many will be college students enrolled in at least half-time between July 1, 2017 and June 30, 2018?** Include the student. _____
13. **What is the student’s state of legal residence?** _____
14. **What is the student’s citizenship status?**
a. U.S. citizen (Skip to question 15.)
 Eligible non-citizen – see instructions (Skip to question 15.)
 Neither of the above (Answer “b” and “c” below.)
b. Country of citizenship: _____
c. Visa classification: F1 F2 J1 J2 G1 G2 G3 G4
15. **What is the student’s email address?** _____

Section B – Student’s 2015 Income and Benefits

The tax line references in this section are for 2015. If married, include spouse’s information in Sections B, C, D, E and F.

16. The following 2015 U.S. income tax return figures are: <input type="radio"/> from a completed IRS Form 1040EZ or 1040A. Go to 17. <input type="radio"/> from a completed IRS Form 1040. Go to 17. <input type="radio"/> a tax return will not be filed. Skip to 21.	
17. 2015 total number of exemptions (2015 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see instructions.)	
18. 2015 adjusted gross income (2015 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4)	\$
19. a. 2015 U.S. income tax paid (2015 IRS Form 1040, line 56 or 1040A, line 37 or 1040EZ, line 10)	a. \$ _____
b. 2015 education credits - Hope and Lifetime Learning (2015 IRS Form 1040, line 50 or 1040A, line 33)	b. \$ _____
20. 2015 itemized deductions 2015 IRS Schedule A, line 29)	\$
21. 2015 income earned from work by student	\$
22. 2015 income earned from work by student’s spouse (if married)	\$
23. 2015 dividend and interest income	\$
24. At any time during 2015 did you receive benefits from any of the following federal benefits programs: SSI, food stamps, free or reduced lunch, TANF, or WIC?	<input type="radio"/> Yes <input type="radio"/> No
25. 2015 untaxed income and benefits (Give total amount for year.)	
a. Social security benefits (Untaxed portion only, see instructions.)	a. \$ _____
b. Temporary Assistance to Needy Families (TANF)	b. \$ _____
c. Child support received for all children	c. \$ _____
d. Earned Income Credit (2015 IRS Form 1040, line 66a or 1040A, line 42a or 1040EZ, line 8a)	d. \$ _____
e. Other (Write total from instructions worksheet, page 3.)	e. \$ _____
26. 2015 earnings from Federal Work-Study or other need-based work programs plus any grant, fellowship, scholarship and assistantship aid to be reported to the IRS in your adjusted gross income. Include AmeriCorps benefits. (See instructions.)	\$

Section C – Student’s Assets

Include trust accounts only in Section D.

27. Cash, savings, and checking accounts (as of today)	\$
28. Total value of noneducation IRA, Keogh, 401(k), 403(b), etc. accounts (as of today)	\$
29. Investments (including Uniform Gifts to Minors – see instructions)	
a. What is the current market value?	a. \$ _____
b. What is owed on them?	b. \$ _____
30. Business and farm	
a. What is the current market value? What is owed on them?	a. \$ _____ \$ _____
b. If you own a business, does it employ more than 100 full-time equivalent employees?	b. <input type="radio"/> Yes <input type="radio"/> No
c. If you own a farm, is the student living on the farm?	c. <input type="radio"/> Yes <input type="radio"/> No
31. Home (renters write in “0”)	
a. What is the current market value?	a. \$ _____
b. What is owed on it?	b. \$ _____
32. Other real estate	
a. What is the current market value?	a. \$ _____
b. What is owed on it?	b. \$ _____
33. If student owns home, give	

a. year purchased	a. _____
b. purchase price	b. \$ _____

Section D – Student’s Trust Information

34. a. Total value of all trust(s) to which the student is a beneficiary	a. \$ _____
b. Is any income or part of the principal currently available?	b. <input type="radio"/> Yes <input type="radio"/> No
c. Who established the trust(s)?	c. <input type="radio"/> Student’s parents <input type="radio"/> Other

Section E – Student’s 2015 Expenses

35. 2015 child support the student paid because of divorce or separation or as the result of a legal requirement	\$ _____
36. 2015 medical and dental expenses not covered by insurance (See instructions)	\$ _____

Section F – Student’s Anticipated Summer/School-Year Resources for 2017-18

37. a. Is the student a veteran of the U.S. Armed Forces or currently serving on active duty in the U.S. Armed Forces for purposes other than training?	a. <input type="radio"/> Yes <input type="radio"/> No	
b. Student’s veterans benefits (July 1, 2017-June 30, 2018)	b. Amount per month \$ _____ Number of months _____	
38. Student’s (and spouses, if married) resources (Don’t enter monthly charges)	Summer 2017 (3 months)	School Year 2017-18 (9 months)
a. Student’s wages, salaries, tips, etc.	\$ _____	\$ _____
b. Spouse’s wages, salaries, tips, etc. (Leave blank if unmarried)	\$ _____	\$ _____
c. Other taxable income	\$ _____	\$ _____
d. Untaxed income and benefits	\$ _____	\$ _____
e. Grants, scholarships, fellowships, etc., including AmeriCorp benefits from sources other than colleges or universities to which the student is applying (List sources in Section P.)		\$ _____
f. Tuition benefits from the parents’, the student’s, and/or the spouse’s employer		\$ _____
g. Amount the student’s parent(s) think they will be able to pay for the student’s 2017-18 college expenses		\$ _____
h. Amounts expected from relatives, spouse’s parents and all other sources (List sources and amounts in Section P.)		\$ _____

Complete the worksheet on page 5 of the instructions that will tell you whether or not parents' information is required.

Section G – Parent’s Household Information

See page 5 of the instructions.

39. How many people are in your parents’ household?

Always include the student and parents. List their names and give information about them in Section L. (See instructions.) _____

40. Of the number in 39, how many will be college students enrolled at least half-time between July 1, 2017 and June 30, 2018? Do not include parents. Include the student. _____

41. a. What is the current marital status of your parents?

- | | |
|---|-------------------------------------|
| <input type="radio"/> Married or in a domestic partnership | <input type="radio"/> Never married |
| <input type="radio"/> Divorced or no longer in a domestic partnership | <input type="radio"/> Separated |
| <input type="radio"/> Remarried | <input type="radio"/> Widowed |

b. If your parent has remarried, enter date of remarriage ____/____/____

42. What is your parents’ state of legal residence? _____

43. What is your parents’ preferred email address? _____

Section H – Parents’ Expenses

	2015	Expected 2016
44. Child support your parents paid because of divorce or separation or as the result of a legal requirement	\$ _____	\$ _____
45. Repayment of parents’ educational loans (See instructions.)	\$ _____	\$ _____
46. Medical and dental expenses not covered by insurance (See instructions.)	\$ _____	\$ _____
47. Total elementary, junior high, and high school tuition paid for dependent children		
a. Amount paid (Don’t include tuition paid for the student.)	a. \$ _____	a. \$ _____
b. For how many dependent children (Don’t include the student.)	b. _____	b. _____

Section I – Parents’ Assets

If parents own all or part of a business or farm, write in its name and the percent of ownership in Section P.

48. Cash, savings, and checking accounts (as of today)	\$ _____
49. Total value of parents’ assets held in the names of the student’s brothers and sisters who are under age 19 and not college students	\$ _____
50. Home (Renters write in “0.” Skip to 50d.)	
a. What is the current market value? What is owed on it?	a. \$ _____ \$ _____
b. Year purchased	b. _____
c. Home purchase price	c. \$ _____
d. Monthly home mortgage or rental payment (If none, explain in Section P)	d. \$ _____
51. Investments	

a. What is the current market value? b. What is owed on it?	a. \$ _____ b. \$ _____
52. Business a. What is the current market value? What is owed on it? b. Does your business employ more than 100 full-time or full-time equivalent employees?	a. \$ _____ \$ _____ b. <input type="radio"/> Yes <input type="radio"/> No
53. Farm a. What is the current market value? What is owed on it? b. Does your family live on the farm?	a. \$ _____ \$ _____ b. <input type="radio"/> Yes <input type="radio"/> No
54. Other real estate a. What is the current market value? What is owed on it? b. Year purchased c. Purchase price	a. \$ _____ \$ _____ b. _____ c. \$ _____

Section J – Parents' 2015 Income & Benefits

The tax line references in this section are for **2015**.

55. The following 2015 U.S. income tax return figures are: <input type="radio"/> from a completed IRS Form 1040EZ or 1040A. Go to 56. <input type="radio"/> from a completed IRS Form 1040. Go to 56. <input type="radio"/> a tax return will not be filed. Skip to 60.	
56. 2015 total number of exemptions (2015 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see instructions)	
57. 2015 adjusted gross income (2015 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4) Breakdown of income below	\$
a. Wages, salaries, tips (2015 IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1)	\$
b. Interest income (2015 IRS Form 1040, line 8a or 1040A, line 8a or 1040EZ, line 2)	\$
c. Dividend income (2015 IRS Form 1040, line 9a or 1040A, line 9a)	\$
d. Net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc. (2015 IRS Form 1040, line 12, 17, and 18) If a loss, enter the amount in parentheses.	\$
e. Other taxable income such as alimony received, capital gains (or losses), pensions, annuities, etc. (2015 IRS Form 1040, lines 10, 11, 13, 14, 15b, 16b, 19, 20b, and 21 or 1040A, lines 10, 11b, 12b, 13, and 14b or 1040EZ, line 3)	\$
f. Adjustments to income (2015 IRS Form 1040, line 36 or 1040A, line 20 - see instructions)	\$
58. a. 2015 U.S. income tax paid (2015 IRS Form 1040, line 56 or 1040A, line 37 or 1040EZ, line 10) b. 2015 education credits — Hope and Lifetime Learning (2015 IRS Form 1040, line 50 or 1040A, line 33)	a. \$ _____ b. \$ _____
59. 2015 itemized deductions (2015 IRS Schedule A, line 29)	\$
60. 2015 income earned from work by father/stepfather	\$
61. 2015 income earned from work by mother/stepmother	\$
62. At any time during 2015, did your parent(s) receive benefits from any of the following federal benefit programs: SSI, food stamps, free or reduced lunch, TANF, or WIC?	<input type="radio"/> Yes <input type="radio"/> No
63. 2015 untaxed income and benefits (Give total amount for the year below. Do not give monthly amounts.)	

a. Social security benefits received for all family members except the student (untaxed portion only)	\$
b. Temporary Assistance for Needy Families (TANF)	\$
c. Child support received for all children	\$
d. Deductible IRA and/or SEP, SIMPLE, or Keogh payments (See instructions.)	\$
e. Payments to tax-deferred pension and savings plans (See instructions.)	\$
f. Tuition and fees deduction (See instructions.)	\$
g. Amounts withheld from wages for dependent care and medical spending accounts	\$
h. Earned Income Credit (2015 IRS Form 1040, line 66a or 1040A, line 42a or 1040EZ, line 8a)	\$
i. Housing, food, and other living allowances received by military, clergy and others (See instructions.)	\$
j. Tax-exempt interest income (2015 IRS Form 1040, line 8b or 1040A, line 8b)	\$
k. Foreign income exclusion (2015 IRS Form 2555, line 45 or Form 2555EZ, line 18)	\$
l. Other – write in total from instructions worksheet, page 9	\$

Section K – Parents’ 2016 and 2017 Anticipated Income and Benefits

If the 2017 anticipated total income and benefits will differ from the 2016 recent total income and benefits by 10 percent or more, explain in Section P.

	2016	2017
64. Income to be earned from work by father/stepfather	\$	\$
65. Income to be earned from work by mother/stepmother	\$	\$
66. Other taxable income	\$	\$
67. Untaxed income and benefits (See 63a-l)	\$	\$

Section L – Family Member Listing

Give information for all family members entered in questions 11 and 39. List up to seven family members in addition to the student. Failure to complete all columns could reduce your aid eligibility. Leave shaded sections blank.

68. Full name of family member (If more lines are needed, use Section P.)	Use codes from below*	Age	2016-17 School Year				2017-18 School Year			
			Name of school or college	Year in school	Scholarships and grants	Parents' contributions	Attend college at least one term		College or university	
					\$	\$	full time	half time	type**	name
1 You - the student applicant					\$	\$				
2					\$	\$				
3					\$	\$				
4					\$	\$				
5					\$	\$				
6					\$	\$				
7					\$	\$				
8					\$	\$				

* Write in the correct code from below:
 1 = Student's parent, 2 = Student's stepparent, 3 = Student's brother or sister, or half-brother or sister
 4 = Student's husband or wife, 5 = Student's child/stepchild. 6 = Student's grandparent, 7 = Student's stepbrother or stepsister, 8 = Other

** Write in the code from the instructions on page 9.

Section P – Explanations/Special Circumstance

Use this space to explain any unusual expenses such as high medical or dental expenses, educational and other debts, child care, elder care, or special circumstances. Also, give information for any outside scholarships you have been awarded. **If more space is needed, use sheets of paper and attach them to this form.** Please print.

Certification: All the information on this form is true and complete to the best of my knowledge. If asked, I agree to give proof of the information that I have given on this form. I realize that this proof may include a copy of my U.S., state or local income tax returns. I certify that all information is correct at this time, and that I will send timely notice to my colleges/programs of any significant change in family income or assets, financial situation, college plans of other children, or the receipt of other scholarships or grants.

Student's signature: _____ Date: ____/____/____

Student's spouse's signature: _____ Date: ____/____/____

Father's (stepfather's) signature: _____ Date: ____/____/____

Mother's (stepmother's) signature: _____ Date: ____/____/____