

Financial Information Worksheet
2012-2013 School Year

STEP ONE: STUDENT INFORMATION

Last Name: _____ First Name _____

State of legal residence: _____

Date of Birth: _____ (MM/DD/YYYY)

Marital Status: Single Divorced Widowed Married Separated

Will you have your first bachelor's degree before July 1, 2012? Yes No

STEP TWO: STUDENT INCOME AND ASSET INFORMATION

(to be completed by ALL students)

In 2010 or 2011, did you (or your spouse) or anyone in your household receive benefits from any of the following federal programs?

SSI Food Stamps Free or Reduced Price Lunch TANF WIC

As of today, are you (or your spouse) a dislocated worker? Yes No

Use estimated or completed 2011 income tax returns. If you have not completed your taxes, you may use the information from your last pay stub of 2011 to complete the worksheet. If you do not have a pay stub, use the average of the last three years gross income.

Will you file a 2011 income tax return? Yes No

Are you eligible to file a 1040A, 1040EZ? Yes No

2011 Adjusted Gross Income: \$ _____

2011 U.S. Income Tax: (amount from IRS tables, based on taxable income) \$ _____

2011 Number of Exemptions: (if claimed by parents, put 0) _____

2011 Student and spouse's income earned from work (W2 forms or IRS Form 1040 line 7 + 12 + 18 + Box 14 of Schedule K1 from 1065)
\$ _____ Student
\$ _____ Spouse

2011 Additional Financial Information: (i.e. child support paid, Work-Study earnings, Hope and Lifetime Learning Tax Credits, Combat pay included in AGI) \$ _____

2011 Untaxed Income: (i.e. child support received, 401(k) and untaxed IRA contributions) \$ _____

Current balance of cash, savings and checking accounts: \$ _____

Current net worth of investments: (exclude your home and retirement plans) \$ _____

Current net worth of business: (exclude a business you own and control and a farm that you live on and operate) \$ _____

STEP THREE: STUDENT STATUS

Were you born before January 1, 1988? Yes No

As of today are you married? (answer "Yes", if you are separated) Yes No

Will you be working on a master's or doctorate program in 2012 - 2013? Yes No

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Are you serving on active duty in the US Armed Forces for purposes other than training? Yes No

Are you a veteran of the US Armed Forces? Yes No

Do you have children who receive more than half their support from you? Yes No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half their support from you, now and through June 30, 2013? Yes No

Were you an orphan, ward of court, or in foster care at any time since you were 13 years old? Yes No

Are you in legal guardianship or determined to be an emancipated minor? Yes No

Since July 1, 2011, were you officially determined to be an unaccompanied youth who was homeless or in danger of becoming homeless? Yes No

Highest school your father completed: Middle school/Jr. high High school College or beyond Other/unknown

Highest school your mother completed: Middle school/Jr. high High school College or beyond Other/unknown

STEP FOUR: PARENT INFORMATION

Parents' marital status as of today: Married Single Divorced/Separated Widowed

Month and year parents were married, separated divorced or widowed: _____

Number in your parents' household in 2012-2013: _____

College students in your parents' household in 2012-2013: (include yourself, but not your parents) _____

Parents' state of legal residence: _____

Father's/stepfather's birth date: _____ Mother's/stepmother's birth date: _____ (MM/DD/YYYY)

STEP FIVE: PARENT INCOME AND ASSET INFORMATION

In 2010 or 2011, did you or anyone in your household receive benefits from any of the following federal programs?

SSI Food Stamps Free or Reduced Price Lunch TANF WIC

As of today, are either of your parents a dislocated worker? Yes No

What was your parents' adjusted gross income for 2011? Adjusted gross income is on IRS Form 1040-line 37; 1040A-line 21; or 1040EZ-line 4. \$ _____

Enter your parents' income tax for 2011. Income tax amount is on IRS Form 1040-line 55; 1040A-line 35; or 1040EZ-line 11. \$ _____

Enter your parents' exemptions for 2011. Exemptions are on IRS Form 1040-line 6d or on Form 1040A-line 6d. _____

How much did your father earn from working in 2011? \$ _____

If applicable how much did your stepfather earn from working in 2011? \$ _____

How much did your mother earn from working in 2011? \$ _____

If applicable, how much did your stepmother earn from working in 2011? \$ _____

Parents' 2011 Additional Financial Information (Enter the amounts for your parent(s)).

Education credits (American Opportunity, Hope or Lifetime Learning tax credits) from IRS Form 1040-line 49 or 1040A-line 31. \$ _____

Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships. \$ _____

Your parents' taxable student grant and scholarship aid **reported to the IRS in your parents' adjusted gross income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships. \$ _____

Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay. \$ _____

Earnings from work under a cooperative education program offered by a college. \$ _____

Parents' 2011 Untaxed Income (Enter the amounts for your parent(s)).

Payments to tax-deferred pension, retirement and savings plans. (paid directly or withheld from earnings) \$ _____

IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified retirement plans. \$ _____

Child support received for any of your parents' children. \$ _____

Tax exempt interest income. \$ _____

Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). \$ _____

Veterans benefits, such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. \$ _____

Other untaxed income not reported above, such as workers' compensation, disability Income, etc. \$ _____

As of today, what is your parents' total current balance of cash, savings and checking accounts? \$ _____

As of today, what is the net worth of your parents' investments, including real estate? **Don't include** the home in which your parents live. \$ _____

As of today, what is the net worth of your parents' current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time employees. \$ _____