

Section A — Student's Information

1. Student's name _____
Last First M.I.

2. Student's permanent mailing address _____
(Mail may be sent to this address.)
Number, street, and apartment number
City State Zip
Postal Code
Country

For students outside the United States and Puerto Rico only →

3. Student's preferred telephone number _____
Area Code

4. Title (optional)
☐ Mr. ☐ Miss, Ms., or Mrs.

5. Student's date of birth _____
Month Day Year

6. Student's Social Security Number _____

7. What will be the student's year in school during 2014-15? (Check only one box.)
☐ first year (never previously attended college) ☐ fifth-year or more undergraduate
☐ first year (previously attended college) ☐ first-year graduate/professional (beyond a 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? (Check only one box.)
☐ unmarried (single, divorced, widowed) ☐ married/remarried
☐ 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 M. See instructions.

12. Of the number in 11, how many will be college students enrolled at least half-time between July 1, 2014, and June 30, 2015? 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 noncitizen — 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 2013 Income and Benefits

The tax line references in this section are for **2012**. Please use your 2012 tax return to estimate your income and benefits for **2013**. If married, include spouse's information in Sections B, C, D, E and F.

16. The following 2013 U.S. income tax return figures are (Check only one box.)
☐ estimated. Will file IRS Form 1040EZ or 1040A. Go to 17.
☐ estimated. Will file IRS Form 1040. Go to 17.
☐ from a completed IRS Form 1040EZ or 1040A. Go to 17.
☐ from a completed IRS Form 1040. Go to 17.
☐ a tax return will not be filed. Skip to 21.

17. 2013 total number of exemptions (2012 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see instructions.) _____

18. 2013 adjusted gross income (2012 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4) \$ _____ .00

19. a. 2013 U.S. income tax paid (2012 IRS Form 1040, line 55 or 1040A, line 35 or 1040EZ, line 10) \$ _____ .00
b. 2013 education credits — Hope and Lifetime Learning (2012 IRS Form 1040, line 49 or 1040A, line 31) \$ _____ .00

20. 2013 itemized deductions (2012 IRS Schedule A, line 29) \$ _____ .00

21. 2013 income earned from work by student \$ _____ .00

22. 2013 income earned from work by student's spouse (if married) \$ _____ .00

23. 2013 dividend and interest income \$ _____ .00

24. At any time during 2013 did you receive benefits from any of the following federal benefits programs: SSI, food stamps, free or reduced lunch, TANF, or WIC? ☐ Yes ☐ No

25. 2013 untaxed income and benefits (Give total amount for year.)
 a. **Social security benefits** (Untaxed portion only, see instructions.) \$ _____ .00
 b. **Temporary Assistance to Needy Families (TANF)** \$ _____ .00
 c. **Child support received for all children** \$ _____ .00
 d. **Earned Income Credit** (2012 IRS Form 1040, line 64a or 1040A, line 38a or 1040EZ, line 8a) \$ _____ .00
 e. **Other** — write total from instructions worksheet, page 3 \$ _____ .00

26. 2013 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.) \$ _____ .00

Section C — Student’s Assets — Include trust accounts only in Section D.

27. Cash, savings and checking accounts (as of today)

\$

.00

28. Total value of noneducation IRA, Keogh, 401(k), 403(b), etc. accounts as of Dec. 31, 2013

\$

.00

29. Investments

What is the current market value?

What is owed on them?

(Including Uniform Gifts to Minors—see instructions)

\$

.00

\$

.00

30 a. Business and farm

\$

.00

\$

.00

b. If you own a business, does it employ more than 100 full-time or full-time equivalent employees?

☐ Yes ☐ No

c. If you own a farm, is the student living on the farm?

☐ Yes ☐ No

31. Home

What is the current market value?

(Renters write in "0.")

\$

.00

What is owed on it?

\$

.00

32. Other real estate

\$

.00

\$

.00

33. If student owns home, give

a. year purchased

b. purchase price

\$

.00

Section D — Student’s Trust Information

34. a. Total value of all trust(s) to which the student is a beneficiary

\$

.00

b. Is any income or part of the principal currently available?

☐ Yes ☐ No

c. Who established the trust(s)?

☐ Student’s parents ☐ Other

Section E — Student’s 2013 Expenses

35. 2013 child support the student paid because of divorce or separation or as the result of a legal requirement

\$

.00

36. 2013 medical and dental expenses not covered by insurance (See instructions.)

\$

.00

Section F — Student’s Expected Summer/School-Year Resources for 2014-15

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?

☐ Yes ☐ No

b. Student’s veterans benefits (July 1, 2014–June 30, 2015)

Amount per month

\$

.00

Number of months

38. Student’s (and spouse’s, if married) resources

(Don’t enter monthly amounts.)

a. Student’s wages, salaries, tips, etc.

Summer 2014 (3 months)

\$

.00

School Year 2014-15 (9 months)

\$

.00

b. Spouse’s wages, salaries, tips, etc. (Leave blank if unmarried)

\$

.00

\$

.00

c. Other taxable income

\$

.00

\$

.00

d. Untaxed income and benefits

\$

.00

\$

.00

e. Grants, scholarships, fellowships, etc., including AmeriCorp benefits from sources other than the colleges or universities to which the student is applying (List sources in Section Q.)

\$

.00

f. Tuition benefits from the parents’, the student’s and/or the spouse’s employer

\$

.00

g. Amount the student’s parent(s) think they will be able to pay for the student’s 2014-15 college expenses

\$

.00

h. Amounts expected from relatives, spouse’s parents and all other sources (List sources and amounts in Section Q.)

\$

.00

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

Section G — Parents’ Household Information — See page 5 of the instruction booklet.

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 M. (See instructions)

40. Of the number in 39, how many will be college students enrolled at least half-time between July 1, 2014, and June 30, 2015? Do not include parents. Include the student.

41. a. What is the current marital status of your parents? (Check only one box.)

☐ single ☐ remarried ☐ divorced ☐ married ☐ separated ☐ 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

44. Child support your parents paid because of divorce or separation or as the result of a legal requirement

2013

Expected 2014

\$

.00

\$

.00

45. Repayment of parents’ educational loans (See instructions.)

\$

.00

\$

.00

46. Medical and dental expenses not covered by insurance (See instructions.)

\$

.00

\$

.00

47. Total elementary, junior high and high school tuition paid for dependent children

a. Amount paid (Don’t include tuition paid for the student.)

\$

.00

\$

.00

b. For how many dependent children? (Don’t include the student.)

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 Q.

48. Cash, savings and checking accounts (as of today)	\$.00							
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	\$.00							
50. a. Home	What is the current market value?	What is owed on it?							
(Renters write in "0." Skip to 50d.)	\$	\$							
b. Year purchased	<table><tr><td></td><td></td><td></td><td></td><td></td></tr></table>						c. Home purchase price	\$.00
d. Monthly home mortgage or rental payment (If none, explain in Section Q.)	\$.00					
51. Investments	What is the current market value?	What is owed on it?	\$.00					
52. a. Business	\$.00	\$.00					
b. Does your business employ more than 100 full-time or full-time equivalent employees?			<input type="checkbox"/> Yes	<input type="checkbox"/> No					
53. a. Farm	\$.00	\$.00					
b. Does your family live on the farm?			<input type="checkbox"/> Yes	<input type="checkbox"/> No					
54. a. Other real estate	\$.00	\$.00					
b. Year purchased	<table><tr><td></td><td></td><td></td><td></td><td></td></tr></table>								
c. Purchase price	\$.00							

Section J — Parents' 2012 Income and Benefits

55. 2012 adjusted gross income (2012 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4)	\$	.00
56. 2012 U.S. income tax paid (2012 IRS Form 1040, line 55 or 1040A, line 35 or 1040EZ, line 10)	\$	.00
57. 2012 itemized deductions (2012 IRS Schedule A, line 29)	\$	.00
58. 2012 untaxed income and benefits (Include the same types of income and benefits that are listed in 67a–l.)	\$	.00

Section K — Parents' 2013 Income and Benefits

The tax line references in this section are for **2012**. Please use your 2012 tax return to **estimate** your income and benefits for **2013**.

59. The following 2013 U.S. income tax return figures are (Check only one box.)	<input type="checkbox"/> estimated. Will file IRS Form 1040EZ or 1040A. Go to 60.	<input type="checkbox"/> estimated. Will file IRS Form 1040. Go to 60.	<input type="checkbox"/> from a completed IRS Form 1040EZ or 1040A. Go to 60.	<input type="checkbox"/> from a completed IRS Form 1040. Go to 60.	<input type="checkbox"/> a tax return will not be filed. Skip to 64.
60. 2013 total number of exemptions (2012 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see instructions)					
61. 2013 adjusted gross income (2012 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4)					
Breakdown of income in 61					
a. Wages, salaries, tips (2012 IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1)					
b. Interest income (2012 IRS Form 1040, line 8a or 1040A, line 8a or 1040EZ, line 2)					
c. Dividend income (2012 IRS Form 1040, line 9a or 1040A, line 9a)					
d. Net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc. (2012 IRS Form 1040, lines 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. (2012 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 (2012 IRS Form 1040, line 36 or 1040A, line 20 — see instructions)					
62. a. 2013 U.S. income tax paid (2012 IRS Form 1040, line 55 or 1040A, line 35 or 1040EZ, line 10)					
b. 2013 education credits — Hope and Lifetime Learning (2012 IRS Form 1040, line 49 or 1040A, line 31)					
63. 2013 itemized deductions (2012 IRS Schedule A, line 29)					
64. 2013 income earned from work by father/stepfather					
65. 2013 income earned from work by mother/stepmother					
66. At any time during 2013, 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="checkbox"/> Yes <input type="checkbox"/> No
67. 2013 untaxed income and benefits (Give total amount for the year. Do not give monthly amounts.)					
a. Social security benefits received for all family members except the student (untaxed portion only)	\$	.00			
b. Temporary Assistance for Needy Families (TANF)	\$	.00			
c. Child support received for all children	\$	.00			
d. Deductible IRA and/or SEP, SIMPLE, or Keogh payments (See instructions.)	\$	.00			
e. Payments to tax-deferred pension and savings plans (See instructions.)	\$	.00			
f. Tuition and fees deduction (See instructions.)	\$	.00			
g. Amounts withheld from wages for dependent care and medical spending accounts	\$	.00			
h. Earned Income Credit (2012 IRS Form 1040, line 64a or 1040A, line 38a or 1040EZ, line 8a)	\$	.00			
i. Housing, food and other living allowances received by military, clergy and others (See instructions.)	\$	.00			
j. Tax-exempt interest income (2012 IRS Form 1040, line 8b or 1040A, line 8b)	\$	.00			
k. Foreign income exclusion (2012 IRS Form 2555, line 45 or Form 2555EZ, line 18)	\$	.00			
l. Other — write total from instructions worksheet, page 7	\$	.00			

Section L — Parents' 2014 Expected Income and Benefits

(If the expected total income and benefits will differ from the 2013 total income and benefits by 10 percent or more, explain in Section Q.)

68. 2014 income to be earned from work by father/stepfather	\$	.00	70. 2014 other taxable income	\$	.00
69. 2014 income to be earned from work by mother/stepmother	\$	.00	71. 2014 untaxed income and benefits (See 67a–l.)	\$	.00

Section M — 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.

72. Table with 8 rows and 9 columns: Full name of family member, Use codes from below, Age (Required—use whole numbers), 2013-14 school year (Name of school or college, Year in school, Scholarships and grants, Parents' contribution), 2014-15 school year (Attend college at least one term full-time half-time, College or university Type, Name). Row 1 is shaded for 'You — the student applicant'.

Write in the correct code from the right. 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 correct code from the instructions on page 8.

Section N — Parents' Information (to be answered by the parent(s) completing this form)

73. Fill in one: Father, Stepfather, Legal guardian, Other (Explain in Q.). a. Name, Date of Birth, b. Check if: Self-employed, Unemployed — Date, c. Occupation, d. Employer, No. years, e. Preferred daytime telephone, f. Retirement plans: Social security, Union/employer, Civil service/state, IRA/Keogh/tax-deferred, Military, Other, g. Total current value of tax-deferred retirement, pension, annuity and savings plans (IRA, Keogh, 401(k), 403(b), etc.) \$.00.

74. Fill in one: Mother, Stepmother, Legal guardian, Other (Explain in Q.). a. Name, Date of Birth, b. Check if: Self-employed, Unemployed — Date, c. Occupation, d. Employer, No. years, e. Preferred daytime telephone, f. Retirement plans: Social security, Union/employer, Civil service/state, IRA/Keogh/tax-deferred, Military, Other, g. Total current value of tax-deferred retirement, pension, annuity and savings plans (IRA, Keogh, 401(k), 403(b), etc.) \$.00.

Section O — Information About Noncustodial Parent (to be answered by the parent who completes this form if the student's biological or adoptive parents are divorced, separated or were never married to each other)

75. a. Who last claimed the student as a tax exemption? Year: b. How much does the noncustodial parent plan to contribute to the student's education for the 2014-15 school year? \$.00.

Section P — Student's Financial Aid Status

76. What will be the student's 2014-15 financial aid status? First-time applicant, entering student (including transfer students), Renewal applicant, continuing student, First-time applicant, continuing student.

Section Q — Explanations/Special Circumstances — 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, Student's spouse's signature, Father's (stepfather's) signature, Mother's (stepmother's) signature, Date completed: Year, Month, Day.