

**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 2009-10?** (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, 2009, and June 30, 2010?** 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 e-mail address?** \_\_\_\_\_

**Section B — Student's 2008 Income and Benefits**

The tax line references in this section are for 2007. Please use your 2007 tax return to estimate your income and benefits for 2008. If married, include spouse's information in Sections B, C, D, E, and F.

**16. The following 2008 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. 2008 total number of exemptions** (2007 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ see instructions.) \_\_\_\_\_

**18. 2008 adjusted gross income** (2007 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4) \$ \_\_\_\_\_ .00

**19. a. 2008 U.S. income tax paid** (2007 IRS Form 1040, line 57 or 1040A, line 35 or 1040EZ, line 10) \$ \_\_\_\_\_ .00

**b. 2008 education credits—Hope and Lifetime Learning** (2007 IRS Form 1040, line 49 or 1040A, line 31) \$ \_\_\_\_\_ .00

**20. 2008 itemized deductions** (2007 IRS Schedule A, line 29) \$ \_\_\_\_\_ .00

Tax Filers Only

**21. 2008 income earned from work by student** \$ \_\_\_\_\_ .00

**22. 2008 income earned from work by student's spouse (if married)** \$ \_\_\_\_\_ .00

**23. 2008 dividend and interest income** \$ \_\_\_\_\_ .00

**24. At any time during 2008 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. 2008 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** (2007 IRS Form 1040, line 66a or 1040A, line 40a or 1040EZ, line 8a) \$ \_\_\_\_\_ .00

e. **Other**—write total from instructions worksheet, page 3 \$ \_\_\_\_\_ .00

**26. 2008 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 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.

<b>48. Cash, savings, and checking accounts</b> (as of today)	\$	.00							
<b>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</b>	\$	.00							
<b>50. a. Home</b>	<b>What is the current market value?</b>	<b>What is owed on it?</b>							
(Renters write in "0." Skip to 50d.)	\$	.00	\$	.00					
<b>b. Year purchased</b>	<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>						<b>c. Home purchase price</b>	\$	.00
<b>d. Monthly home mortgage or rental payment</b> (If none, explain in Section Q.)	\$	.00							
			<b>51. Investments</b>	<b>What is the current market value?</b> \$ .00 <b>What is owed on it?</b> \$ .00					
			<b>52. a. Business</b>	\$ .00 \$ .00					
			<b>b. Does your business employ more than 100 full-time or full-time equivalent employees?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No					
			<b>53. a. Farm</b>	\$ .00 \$ .00					
			<b>b. Does your family live on the farm?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No					
			<b>54. a. Other real estate</b>	\$ .00 \$ .00					
			<b>b. Year purchased</b>	<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table> \$ .00					
			<b>c. Purchase price</b>	\$ .00					

**Section J — Parents' 2007 Income and Benefits**

<b>55. 2007 adjusted gross income</b> (2007 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4)	\$	.00
<b>56. 2007 U.S. income tax paid</b> (2007 IRS Form 1040, line 57 or 1040A, line 35 or 1040EZ, line 10)	\$	.00
<b>57. 2007 itemized deductions</b> (2007 IRS Schedule A, line 29)	\$	.00
<b>58. 2007 untaxed income and benefits</b> (Include the same types of income and benefits that are listed in 67a–l.)	\$	.00

**Section K — Parents' 2008 Income and Benefits**

The tax line references in this section are for **2007**. Please use your 2007 tax return to **estimate** your income and benefits for **2008**.

**59. The following 2008 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.
---	--	---	--	--

<b>60. 2008 total number of exemptions</b> (2007 IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see instructions)	<table border="1" style="display: inline-table; vertical-align: middle;"><tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr></table>						<b>60.</b>	\$	.00
<b>61. 2008 adjusted gross income</b> (2007 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4)		<b>61.</b>	\$	.00					
<b>Breakdown of income in 61</b>		<b>61. a.</b>	\$	.00					
<b>a. Wages, salaries, tips</b> (2007 IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1)		<b>b.</b>	\$	.00					
<b>b. Interest income</b> (2007 IRS Form 1040, line 8a or 1040A, line 8a or 1040EZ, line 2)		<b>c.</b>	\$	.00					
<b>c. Dividend income</b> (2007 IRS Form 1040, line 9a or 1040A, line 9a)		<b>d.</b>	\$	.00					
<b>d. Net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc.</b> (2007 IRS Form 1040, lines 12, 17, and 18) If a loss, enter the amount in (parentheses).		<b>e.</b>	\$	.00					
<b>e. Other taxable income such as alimony received, capital gains (or losses), pensions, annuities, etc.</b> (2007 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)		<b>f.</b>	\$	.00					
<b>f. Adjustments to income</b> (2007 IRS Form 1040, line 36 or 1040A, line 20—see instructions)		<b>62. a.</b>	\$	.00					
<b>62. a. 2008 U.S. income tax paid</b> (2007 IRS Form 1040, line 57 or 1040A, line 35 or 1040EZ, line 10)		<b>b.</b>	\$	.00					
<b>b. 2008 education credits—Hope and Lifetime Learning</b> (2007 IRS Form 1040, line 49 or 1040A, line 31)		<b>63.</b>	\$	.00					
<b>63. 2008 itemized deductions</b> (2007 IRS Schedule A, line 29)		<b>64.</b>	\$	.00					
<b>64. 2008 income earned from work by father/stepfather</b>		<b>65.</b>	\$	.00					
<b>65. 2008 income earned from work by mother/stepmother</b>									
<b>66. At any time during 2008 did your parent(s) receive benefits from any of the following federal benefit programs:</b> SSI, food stamps, free or reduced lunch, TANF or WIC?				<input type="checkbox"/> Yes <input type="checkbox"/> No					
<b>67. 2008 untaxed income and benefits</b> (Give total amount for the year. Do not give monthly amounts.)		<b>h. Earned Income Credit</b> (2007 IRS Form 1040, line 66a or 1040A, line 40a or 1040EZ, line 8a)	\$	.00					
<b>a. Social security benefits received for all family members except the student</b> (untaxed portion only)	\$	<b>i. Housing, food, and other living allowances received by military, clergy, and others</b> (See instructions.)	\$	.00					
<b>b. Temporary Assistance for Needy Families (TANF)</b>	\$	<b>j. Tax-exempt interest income</b> (2007 IRS Form 1040, line 8b or 1040A, line 8b)	\$	.00					
<b>c. Child support received for all children</b>	\$	<b>k. Foreign income exclusion</b> (2007 IRS Form 2555, line 45 or Form 2555EZ, line 18)	\$	.00					
<b>d. Deductible IRA and/or SEP, SIMPLE, or Keogh payments</b> (See instructions.)	\$	<b>l. Other</b> —write total from instructions worksheet, page 7	\$	.00					
<b>e. Payments to tax-deferred pension and savings plans</b> (See instructions.)	\$								
<b>f. Tuition and fees deduction</b> (See instructions.)	\$								
<b>g. Amounts withheld from wages for dependent care and medical spending accounts</b>	\$								

**Section L — Parents' 2009 Expected Income and Benefits**

(If the expected total income and benefits will differ from the 2008 total income and benefits by 10% or more, explain in Section Q.)

<b>68. 2009 income to be earned from work by father/stepfather</b>	\$	.00	<b>70. 2009 other taxable income</b>	\$	.00
<b>69. 2009 income to be earned from work by mother/stepmother</b>	\$	.00	<b>71. 2009 untaxed income and benefits</b> (See 67a–l.)	\$	.00

**Section M — Family Member Listing** — Give information for all family members entered in question 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.

	Full name of family member (If more lines are needed, use Section Q.)	Use codes from below	Age (Required—use whole numbers)	2008-09 school year				2009-10 school year			
				Name of school or college	Year in school	Scholarships and grants	Parents' contribution	Attend college at least one term		College or university	
								full-time	half-time	Type	Name
1	<b>You — the student applicant</b>					\$	\$				
2						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
3						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
4						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
5						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
6						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
7						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		
8						\$	\$	<input type="checkbox"/>	<input type="checkbox"/>		

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  Father  Stepfather  Legal guardian  Other (Explain in Q.)

a. Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

b.  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  Mother  Stepmother  Legal guardian  Other (Explain in Q.)

a. Name \_\_\_\_\_ Date of Birth \_\_\_\_\_

b.  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 2009-10 school year?  
\$ \_\_\_\_\_ .00

**Section P — Student's Financial Aid Status**

76. What will be the student's 2009-10 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.

[Empty space for explanations and special circumstances]

**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:

\_\_\_\_/\_\_\_\_/\_\_\_\_  
Month Day Year

2008  
 2009