

Full name First _____ Last _____

Permanent mailing address Street _____

City _____ State _____ Zip _____

Gender M _____ F _____ Social Security Number _____

Date of birth Month _____ Day _____ Year _____

What is your parents' marital status as of today?

Married/Remarried _____ Single _____ Divorced/Separated _____ Widowed _____

How many people are in your parents' household? _____

How many in previous question (exclude your parents) will be college students between July 1, 2009 and June 30, 2010. _____

Parents

What is your parents' estimated adjusted gross income for 2008. \$ _____

Enter the total amount of your parents' estimated income tax for 2008. \$ _____

How much did your parents earn from working (wages, salaries, tips, etc.) in 2007? Mother: \$ _____ Father: \$ _____

Parent Worksheets: (see back) Worksheet A \$ _____ Worksheet B \$ _____ Worksheet C \$ _____

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 (not your home)? \$ _____

As of today, what is the net worth of your parents' current businesses and/or investment farms? \$ _____

Age of older parent _____

Student

What is your estimated adjusted gross income for 2008. \$ _____

Enter the total amount of your estimated income tax for 2008. \$ _____

How much did you earn from working (wages, salaries, tips, etc.) in 2008? \$ _____

Student Worksheets: (see back) Worksheet A \$ _____ Worksheet B \$ _____ Worksheet C \$ _____

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

As of today, what is the net worth of your investments, including real estate (not your home)? \$ _____

As of today, what is the net worth of your current businesses and/or investment farms? \$ _____

Worksheets

Report amounts received in 2007

	Parent	Student
Worksheet A		
Earned income credit from IRS Form 1040, line 65a; 1040A, line 41a; 1040EZ, line 8a, or Telefile line L.	\$	
Additional child tax credit from IRS Form 1040 - line 67 or 1040A - line 42.	\$	
Welfare benefits, including Temporary Assistance for Needy families (TANF). Don't include food stamps or subsidized housing.	\$	
Social Security benefits received, for all household members, that were not taxed (such as SSI)	\$	
Total		

Worksheet B		
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in Boxes 12a through 12d, codes D, E, F, G, H, and S	\$	
IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 - total of lines 25 + 32 or 1040A - lines 17	\$	
Child support you received for all children. Don't include foster care or adoption payments.	\$	
Tax exempt interest income from IRS Form 1040 - line 8b or 1040A - line 8b	\$	
Foreign income exclusion from IRS Form 2555 - line 43 or 2555EZ - line 18.	\$	
Untaxed portions of IRA distributions from IRS Form 1040 - lines 15a minus 15b) or 1040A -lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$	
Untaxed portions of pensions from IRS Form 1040 - lines (16a minus 16b) or 1040A - lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$	
Credit for federal tax on special fuels from IRS Form 4136, line 10 - nonfarmers only	\$	
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$	
Veterans' noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$	
Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as workers' compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc.	\$	
Don't include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$	
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form	\$	
Total		

Worksheet C		
Education credits (Hope and Lifetime Learning tax credits) 1040, line 49 or 1040A, line 31	\$	
Child support you paid because of divorce or separation or as a result of a legal requirement.	\$	
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships	\$	
Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$	
Total		