

Parent Financial Information Forms INSTRUCTIONS

The applicant and both of his or her natural or adoptive parents must complete the proper financial information forms. The applicant may attach all of the forms in PDF format within the application. **Applications without both applicant AND parent financial information forms are incomplete and will not be considered.** If you cannot provide these documents, you must attach a signed letter of explanation in its place, describing the special circumstances that keep you from providing the required documents. Explanatory letters will be reviewed, and eligibility determined, on a case-by-case basis. If you have questions, send an email to: jkc-u@act.org.

Parent Financial Information Forms may be downloaded from the Foundation's website and completed using Microsoft Word. Photocopies are also acceptable. Please type or write legibly in the space allotted. Once these forms are filled out, the applicant may convert to PDF format and attach them in the required section of the application.

The applicant's **parents** must complete the appropriate parent form(s):

- If the applicant's parents (natural or adoptive) are **both living and married to each other**, they must complete **Parent Form A**.
- If the applicant's parents (natural or adoptive) are **single, divorced, separated, or widowed**,
 - The **mother** must complete **Parent Form B (1)**, and
 - The **father** must complete **Parent Form B (2)**.
- If either of the applicant's parents is deceased or cannot be found, then the applicant must attach a letter of explanation and copies of official documentation, if applicable. The legal guardian, if any, must complete the most appropriate form listed above in the deceased parent's place.

Note: Parents **living abroad** and not filing US taxes for 2008, **must** complete the forms as best as possible and attach a statement (in English or a certified translation into English) from the employer(s) listing all income and benefits for 2008.

► FINANCIAL INFORMATION FORMS CHECKLIST

The applicant may attach in PDF format within the application a **signed original** of the appropriate Parent Financial Information Forms.

- ✓ **Parent Form(s):**
Parent Form A completed and signed by **both** parents
OR
Parent Form B (1) completed and signed by the applicant's mother **AND Parent Form B (2)** completed and signed by the applicant's father
- ✓ **Copies of tax forms**, including W-2 forms, schedules, and attachments, for **applicant AND both parents**. Applicants and parents should black out the social security number or personal ID number prior to copying tax forms, schedules, and other attachments. Please remember to include W-2 forms.
- ✓ **Reminder:** This application is confidential and will be reviewed only by the campus nomination committee and Foundation staff. The Foundation will closely guard the privacy of all nominees and their parents.

► FURTHER INSTRUCTIONS FOR PARENT FORM A

- Use the information from the **parents' 2008 federal income tax returns** to answer questions where indicated.
- Do not leave fields blank. If a value is zero, enter "0." Round all figures to the nearest dollar.
- If parents have assets jointly owned with any other person(s), they should list only their own portion of the assets.
- One copy of the parents' tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments.
- Do not include the applicant's financial information on Parent Form A. It is included in the Applicant Form.

► FURTHER INSTRUCTIONS FOR PARENT FORM B (1)

- Use the information from the **mother's 2008 federal income tax return** to answer the questions where indicated.
- Do not leave fields blank. If a value is zero, enter "0." Round all figures to the nearest dollar.
- If the applicant's mother is single, she should list all of her income and assets.
- If the applicant's mother is remarried, she should list (a) all of her own income and benefits (lines 1a and 2 through 11) and (b) half the combined family assets (lines 13 through 17).
- If the mother is remarried and filed a joint tax return with the stepparent, amounts reported on joint tax returns should be adjusted as necessary. (Lines 4 and 8 in Parent Form B (1) include directions.)
- If the mother has assets jointly owned with any other person (besides her spouse, if any), she should list only her own portion of the assets.
- One copy of the mother's tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments.
- Do not include the applicant's financial information on Parent Form B (1). It is included in the Applicant Form.
- The applicant's father will answer the same questions on his income and assets separately in Parent Form B (2).

► FURTHER INSTRUCTIONS FOR PARENT FORM B (2)

- Use the information from the **father's 2008 federal income tax return** to answer the questions where indicated.
- Do not leave fields blank. If a value is zero, enter "0." Round all figures to the nearest dollar.
- If the applicant's father is single, he should list all of his income and assets.
- If the applicant's father is remarried, he should list (a) all of his own income and benefits (lines 1a and 2 through 11) and (b) half the combined family assets (lines 13 through 17).
- If the father is remarried and filed a joint tax return with the stepparent, amounts reported on joint tax returns should be adjusted as necessary. (Lines 4 and 8 in Parent Form B (2) include directions.)
- If the father has assets jointly owned with any other person (besides his spouse, if any), he should list only his own portion of the assets.
- One copy of the father's tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments.
- Do not include the applicant's financial information on Parent Form B (2). It is included in the Applicant Form.
- The applicant's mother will answer the same questions on her income and assets separately in Parent Form B (1).

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Financial Information Forms: PARENT FORM A

Applicant's parents (natural or adoptive) must complete this form if they are **both living and married to each other**.

This application is confidential and will be reviewed only by the campus nomination committee and Foundation staff.

Type or write legibly. Use only the space allotted. Be sure to read the separate instructions section. If you have questions, send an email to jkc-u@act.org.

- If the applicant's parents (natural or adoptive) are **single, divorced, separated, or widowed**,
 - The **mother** must complete **Parent Form B (1)**, and
 - The **father** must complete **Parent Form B (2)**.
- If either of the applicant's parents is deceased or cannot be found, then the applicant must provide a letter of explanation and copies of official documents, if applicable. The legal guardian, if any, must complete the most appropriate form listed above in the deceased parent's place.

Both of the applicant's parents (natural or adoptive) must complete and sign the parent forms. Applicants may upload parental forms and letters of explanation in PDF format in the application. Applications submitted without parental forms will not be considered.

Scholarship applicant's name: Last First MI

Please check if the applicant's **MOTHER and FATHER** are married to each other

Other; please specify

If guardian is completing this form, please elaborate. If more space is needed, the applicant may attach a sheet to this form to provide the information requested.

► PARENTS' COMBINED HOUSEHOLD INFORMATION

Mother/Guardian Name: Last First MI

Father/Guardian Name: Last First MI

Check box if guardians are listed instead of mother and father.

Address

City State Zip -

Home phone () Daytime phone ()

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List members of parents' household (excluding applicant) in the table below. Please note:

1. Always list **both parents** in the table.
2. List the **other members of the parents' household, if any**, in the table below.

Include:

- Dependents claimed on federal taxes (2008 IRS Form 1040 line 6c; 1040A line 6c; 1040EZ not applicable), and
- Other people living in the household **only** if they will get more than half of their support from the applicant's parents during the coming academic year.

Do **not** include the applicant, even if claimed as a dependent on taxes. (He or she is listed in the **Applicant Form**.)

For each household member, list name, relationship to parents, and age. Add comments as necessary.

For children attending college full-time during the 2010-11 academic year in a program leading to a degree or certificate, list the name and location of the college they will attend in the comments field.

If more space is needed, attach a sheet as a PDF to this form to provide the information requested in this table.

Name	Relationship	Age	Comments
Mother:			
Father:			

► **PARENTS' COMBINED FINANCIAL INFORMATION**

Instructions for completing the following form:

- Use the information from the **parents' 2008 federal income tax returns** to answer the questions where indicated.
- Do not leave fields blank. If a value is zero, enter "0". Round all figures to the nearest dollar.
- If the parents have assets jointly owned with any other person(s), they should list only their own portion of the assets.
- A copy of the parents' tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments. Parents should black out their social security number or personal ID number on tax forms and other attachments.
- Parents **living abroad** in 2008 and not filing US taxes must complete the form as best as possible and attach as a PDF, a statement (in English or a certified translation into English) from each parent's employer(s) listing all income and benefits for 2008.
- Do not include assets belonging to the applicant in Parent Form A. They are included in the Applicant Form.

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► PARENTS' INCOME AND BENEFITS

Parents not required to file taxes in 2008 must initial here: _____

Explanation:

- 1 \$ _____ **Parent's wages, salaries, tips, etc. (income from working)**
2008 W-2 forms or 2008 IRS Form 1040 lines 7+12+18; 1040A line 7; 1040EZ line 1
- 2 \$ _____ **Parent's interest income**
2008 IRS Form 1040 line 8a; 1040A line 8a; 1040EZ not applicable
- 3 \$ _____ **Parent's dividend income**
2008 IRS Form 1040 line 9a; 1040A line 9a; 1040EZ not applicable
- 4 \$ _____ **Parent's Adjusted Gross Income (AGI) before exemptions and deductions, as listed on tax form**
2008 IRS Form 1040 line 37; 1040A line 21; 1040EZ line 4
- 5 \$ _____ **Child support received by parents, if any**
List yearly, not monthly, amount.
- 6 \$ _____ **Payments to tax-deferred pension and savings plans**
W-2 forms, Box 12a through 12d, codes D, E, F, G, H, and S
Include untaxed payments to 401(k) and 403(b) plans.
- 7 \$ _____ **Contributions to pre-tax dependent care accounts**
W-2 forms, box 10
- 8 \$ _____ **Parents' federal income tax paid**
2008 IRS Form 1040 line 61; 1040A line 37; 1040EZ line 7
Do not copy the amount of "federal income tax withheld" from a W-2 form.
- 9 \$ _____ **Child support paid by parents, if any**
List yearly, not monthly, amount.
- 10 \$ _____ **Credit for child and dependent care expenses claimed on federal taxes**
2008 IRS Form 1040 line 48; 1040A line 29; 1040EZ not applicable
- 11 \$ _____ **Nonreimbursed medical or dental expenses claimed on federal taxes**
2008 IRS Form 1040, Schedule A, line 4; Forms 1040A and 1040EZ not applicable
- 12 _____ dependent(s) **Dependents in college or will be attending college in 2010-11 academic year (excluding applicant)**
Count each dependent who is a full-time undergraduate student. (Number of college students claimed must agree with the number listed in above table of parents' household.)
Do **not** include applicant.

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► PARENTS' ASSETS

- If the parents have assets jointly owned with other person(s), include only the portion of the assets that the parents own.

- 13** \$ _____ **Parents' cash, savings and checking account balances** (as of today)
Include the total balance for all accounts.
- 14** \$ _____ **Parents' investment equity** (as of today)
Include investments owned by the parents and **not included** in the applicant's financial information form. Investments include money market funds, mutual funds, certificates of deposit, stocks, bonds, education IRAs, Uniform Gifts to Minors accounts, college savings plans, trusts, etc. Do not include the value of life insurance policies, retirement plans, savings or checking accounts, or the value of prepaid tuition plans.
- 15a** \$ _____ **Parents' home equity** (as of today)
If parents own a home, include **equity** of parents' primary residence.
(Current value of home \$ _____ minus home debt \$ _____ equals equity \$ _____.)
- 15b** _____ year(s) **(Parents' home equity, continued)** How many **years** have the parents owned the home?
Round up to the nearest year.
- 16** \$ _____ **Parents' real estate equity (apart from main residence)** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any real estate owned by the parents. **Do not include** real estate equity listed on the applicant's financial information form.
- 17** \$ _____ **Parents' business and/or farm equity** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any business/farm owned by the parents. **Do not include** business/farm equity listed on the applicant's financial forms.
- 18a** \$ _____ **Parents' retirement savings** (as of today)
Include current value of retirement savings, such as IRA, Keogh, 401(k), 403(b), or other retirement plans
- 18b** \$ _____ **Parents' pension assets** (as of this year)
Include the yearly amount received from all pension plans. Include all regular annuity payments.

The parents may include an explanation as a PDF, (up to two pages long) about any **special financial circumstances** relevant to their income information, such as business losses, change in employment status, extraordinary medical expenses, expenses for disabled children, etc.

By signing below, I certify that all information provided on this financial information form is accurate to the best of my knowledge.

Mother's or legal guardian's signature (required)

Date

Father's or legal guardian's signature (required)

Date

Applicant must initial

Date

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Financial Information Forms: PARENT FORM B (1)

The **mother** of the applicant (natural or adoptive) must complete this form if she is **single, divorced, separated, or widowed**.

This application is confidential and will be reviewed only by the campus nomination committee and Foundation staff.

Type or write legibly. Use only the space allotted. Be sure to read the separate instructions section. If you have questions, send an email to jkc-u@act.org.

- If the applicant's parents (natural or adoptive) are **both living and married to each other**, they must complete **Parent Form A**.
- If the applicant's **father** (natural or adoptive) is single, divorced, separated, or widowed, he must complete **Parent Form B (2)**.
- If either of the applicant's parents is deceased or cannot be found, then the applicant must attach a letter of explanation and copies of official documents. The legal guardian, if any, must complete the most appropriate form listed above in the deceased parent's place.

Both of the applicant's parents (natural or adoptive) must complete and sign the parent forms. Applicants may upload parental forms and letters of explanation in PDF format, in the application. Applications submitted without parental forms will not be considered.

Scholarship applicant's name: Last	First	MI
Please check if the applicant's MOTHER is	<input type="checkbox"/> Unmarried (single, divorced, widowed)	<input type="checkbox"/> Separated
	<input type="checkbox"/> Deceased	<input type="checkbox"/> Married (to other)
	<input type="checkbox"/> Other; please specify	
Please check if the applicant's FATHER is	<input type="checkbox"/> Unmarried (single, divorced, widowed)	<input type="checkbox"/> Separated
	<input type="checkbox"/> Deceased	<input type="checkbox"/> Married (to other)
	<input type="checkbox"/> Other; please specify	

If guardian is completing this form, please elaborate. If more space is needed, the applicant may attach a sheet to this form to provide the information requested.

► MOTHER'S HOUSEHOLD INFORMATION

Mother/Guardian name: Last	First	MI
<input type="checkbox"/> Check box if guardian is listed instead of mother.		
Address		
City	State	Zip -
Home phone ()	Daytime phone ()	

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List members of mother’s household (excluding applicant) in the table below. Please note:

1. Always list the applicant’s **mother** (or guardian) in the table.
2. List the **other members of the mother’s household, if any**, in the table below.

Include:

- Spouse,
- Dependents claimed on federal taxes (2008 IRS Form 1040 line 6c; 1040A line 6c; 1040EZ not applicable), and
- Other people living in the household **only** if they will get more than half of their support from the applicant’s mother during the coming academic year.

Do not include:

- The applicant (even if claimed as a dependent on taxes) or
- Stepchildren, unless the stepchildren receive more than half of their support from applicant’s mother.

For each household member, list name, relationship to mother, and age. Add comments as necessary.

For children attending college full-time during the 2010-11 academic year in a program leading to a degree or certificate, list the name and location of the college they will attend in the comments area.

If more space is needed, attach a sheet as a PDF, to this form to provide the information requested in this table.

Name	Relationship	Age	Comments
Mother:			

► **MOTHER’S FINANCIAL INFORMATION**

Instructions for completing the following form:

- Use the information from the mother’s **2008 federal income tax return** to answer the questions where indicated.
- Do not leave fields blank. If a value is zero, enter “0”. Round all figures to the nearest dollar.
- If the applicant’s mother is single, she should list all of her income and assets.
- If the applicant’s mother is remarried, she should list (a) all of her own income and benefits (lines 1a and 2 through 11) and (b) half the combined family assets (lines 13 through 17).
- If the mother is remarried and filed a joint tax return with the stepfather, amounts reported on the joint tax return should be adjusted as necessary. (Lines 4 and 8 include directions.)
- If the mother has assets jointly owned with any other person (besides her spouse, if any), she should list only her own portion of the assets.
- A copy of the mother’s tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments. Parents should black out their social security number or personal ID number on tax forms and other attachments.
- Parents living abroad in 2008 and not filing US taxes must complete the form as best as possible and attach as a PDF, a statement (in English or a certified translation into English) from each parent’s employer(s) listing all income and benefits for 2008.
- Do not include assets belonging to the applicant in Parent Form B (1). They are included in the Applicant Form.
- The applicant’s father will answer the same questions on his income and assets in Parent Form B (2).

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► **MOTHER'S INCOME AND BENEFITS**

Parents not required to file taxes in 2008 must initial here: _____

Explanation:

- 1a** \$ _____ **Mother's wages, salaries, tips, etc. (income from working)**
2008 W-2 forms or 2008 IRS Form 1040 lines 7+12+18; 1040A line 7; 1040EZ line 1
- 1b** \$ _____ **Spouse's (if any) wages, salaries, tips, etc. (income from working)**
2008 W-2 forms or 2008 IRS Form 1040 lines 7+12+18; 1040A line 7; 1040EZ line 1
- 2** \$ _____ **Mother's interest income**
2008 IRS Form 1040 line 8a; 1040A line 8a; 1040EZ not applicable
- 3** \$ _____ **Mother's dividend income**
2008 IRS Form 1040 line 9a; 1040A line 9a; 1040EZ not applicable
- 4** \$ _____ **Mother's Adjusted Gross Income (AGI)**
2008 IRS Form 1040 line 37; 1040A line 21; 1040EZ line 4
If mother is **remarried** and filed **jointly**, AGI must be adjusted. To adjust, subtract mother's and spouse's wages or salaries from AGI and divide the remainder of the AGI by two. Then add mother's wages or salaries back in and list the adjusted AGI to the left.
If mother filed **singly**, simply list AGI as it appears on tax form.
- 5** \$ _____ **Child support received by mother, if any**
List yearly, not monthly, amount.
- 6** \$ _____ **Payments to tax-deferred pension and savings plans**
W-2 forms, Box 12a through 12d, codes D, E, F, G, H, and S
Include untaxed payments to 401(k) and 403(b) plans.
- 7** \$ _____ **Contributions to pre-tax dependent care accounts**
W-2 forms, box 10
- 8** \$ _____ **Mother's federal income tax paid**
2008 IRS Form 1040 line 61; 1040A line 37; 1040EZ line 7
Do not copy the amount of "federal income tax withheld" from a W-2 form.
- 9** \$ _____ **Child support paid by mother, if any**
List yearly, not monthly, amount.
- 10** \$ _____ **Credit for child and dependent care expenses claimed on federal taxes**
2008 IRS Form 1040 line 48; 1040A line 29; 1040EZ not applicable
- 11** \$ _____ **Nonreimbursed medical or dental expenses claimed on federal taxes**
2008 IRS Form 1040, Schedule A, line 4; Forms 1040A and 1040EZ not applicable
- 12** _____ dependent(s) **Dependents in college or will be attending college in 2010-11 academic year (excluding applicant)**
Count each dependent who is a full-time undergraduate student. (Number of college students claimed must agree with the number listed in above table of mother's household.) Do **not** include applicant.

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► **MOTHER'S ASSETS**

- If the applicant's mother is single, she should list all of her income and assets.
- If the applicant's mother is remarried, she should list (1) all of her own income and benefits and (2) half the combined family assets.
- If the mother owns assets jointly with others (not spouse), include only the portion of the assets that the mother owns.

13 \$ _____ **Mother's cash, savings and checking account balances** (as of today)
Include the total balance for all accounts.

14 \$ _____ **Mother's investment equity** (as of today)
Include investments owned by the mother and **not included** in the applicant's financial information form. Investments include money market funds, mutual funds, certificates of deposit, stocks, bonds, education IRAs, Uniform Gifts to Minors accounts, college savings plans, trusts, etc. Do not include the value of life insurance policies, retirement plans, savings or checking accounts, or the value of prepaid tuition plans.

15a \$ _____ **Mother's home equity** (as of today)
If mother is a homeowner, include equity of mother's primary residence.
(Current value of home \$ _____ minus home debt \$ _____ equals equity \$ _____.)

15b _____ year(s) **(Mother's home equity, continued)** How many **years** has the mother owned the home?
Round up to the nearest year.

16 \$ _____ **Mother's real estate equity (apart from main residence)** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any real estate owned by the mother. **Do not include** real estate equity listed in the applicant's financial forms.

17 \$ _____ **Mother's business and/or farm equity** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any business/farm owned by the mother. **Do not include** business/farm equity listed in the applicant's financial forms.

18a \$ _____ **Mother's retirement savings or pension assets** (as of today)
Include current value of retirement savings, such as IRA, Keogh, 401(k), 403(b), or other retirement plans.

18b \$ _____ **Mother's pension assets** (as of this year)
Include the yearly amount received from all pension plans. Include all regular annuity payments.

The applicant's mother may include an explanation as a PDF, (up to two pages long) about any **special financial circumstances** relevant to her income information, such as business losses, change in employment status, extraordinary medical expenses, expenses for disabled children, etc.

By signing below, I certify that all information provided in this financial information form is accurate to the best of my knowledge.

Mother's or legal guardian's signature (required) Date

Stepfather's (if any) signature Date

Applicant must initial Date

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Financial Information Forms: PARENT FORM B (2)

The **father** of the applicant must complete this form if he is **single, divorced, separated or widowed**.

This application is confidential and will be reviewed only by the campus nomination committee and Foundation staff.

Type or write legibly. Use only the space allotted. Be sure to read the separate instructions section. If you have questions, send an email to **jkc-u@act.org**.

- If the applicant's parents (natural or adoptive) are **both living and married to each other**, they must complete **Parent Form A**.
- If the applicant's **mother** (natural or adoptive) is **single, divorced, separated, or widowed**, she must complete **Parent Form B (1)**
- If either of the applicant's parents is deceased or cannot be found, then the applicant must attach a letter of explanation and copies of official documents, if applicable. The legal guardian, if any, must complete the most appropriate form listed above in the deceased parent's place.

Both of the applicant's parents (natural or adoptive) must complete and sign the parent forms. Applicants may upload parental forms and letters of explanation in PDF format, in the application. Applications submitted without parental forms will not be considered.

Scholarship applicant's name: Last	First	MI	
Please check if the applicant's MOTHER is	<input type="checkbox"/> Unmarried (single, divorced, widowed)	<input type="checkbox"/> Separated	<input type="checkbox"/> Married (to other)
	<input type="checkbox"/> Deceased	<input type="checkbox"/> Other; please specify	
Please check if the applicant's FATHER is	<input type="checkbox"/> Unmarried (single, divorced, widowed)	<input type="checkbox"/> Separated	<input type="checkbox"/> Married (to other)
	<input type="checkbox"/> Deceased	<input type="checkbox"/> Other; please specify	

If guardian is completing this form, please elaborate. If more space is needed, the applicant may attach a sheet to this form to provide the information requested.

► FATHER'S HOUSEHOLD INFORMATION

Father/Guardian name: Last	First	MI
<input type="checkbox"/> Check box if guardian is listed instead of father.		
Address		
City	State	Zip -
Home phone ()	Daytime phone ()	

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List members of father’s household (excluding applicant) in the table below. Please note:

1. Always list the applicant’s **father** (or guardian) in the table.
2. List the **other members of the father’s household, if any**, in the table below.

Include:

- Spouse,
- Dependents claimed on federal taxes (2008 IRS Form 1040 line 6c; 1040A line 6c; 1040EZ not applicable), and
- Other people living in the household **only** if they will get more than half of their support from the applicant’s father during the coming academic year.

Do **not** include:

- The applicant (even if claimed as a dependent on taxes) or
- Stepchildren, unless the stepchildren receive more than half of their support from applicant’s father.

For each household member, list name, relationship to father, and age. Add comments as necessary.

For children attending college full-time during the 2010-11 academic year in a program leading to a degree or certificate, list the name and location of the college they will attend in the comments area.

If more space is needed, attach a sheet as a PDF, to this form to provide the information requested in this table.

Name	Relationship	Age	Comments
Father:			

► **FATHER’S FINANCIAL INFORMATION**

Instructions for completing the following form:

- Use the information from the father’s **2008 federal income tax return** to answer the questions where indicated.
- Do not leave fields blank. If a value is zero, enter “0”. Round all figures to the nearest dollar.
- If the applicant’s father is single, he should list all of his income and assets.
- If the applicant’s father is remarried, he should list (a) all of his own income and benefits (lines 1a and 2 through 11) and (b) half the combined family assets (lines 13 through 17).
- If the father is remarried and filed a joint tax return with the stepmother, amounts reported on the joint tax return should be adjusted as necessary. (Lines 4 and 8 include directions.)
- If the father has assets jointly owned with any other person (besides his spouse, if any), he should list only his own portion of the assets.
- A copy of the father’s tax form(s) may be attached as a PDF, including W-2 forms, schedules, and attachments. Parents should black out their social security number or personal ID number on tax forms and other attachments.
- Parents living abroad in 2008 and not filing US taxes must complete the form as best as possible and attach as a PDF, a statement (in English or a certified translation into English) from each parent’s employer(s) listing all income and benefits in 2008.
- Do not include assets belonging to the applicant in Parent Form B (2). They are included in the Applicant Form.
- The applicant’s mother will answer the same questions on her income and assets in Parent Form B (1).

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► **FATHER'S INCOME AND BENEFITS**

Parents not required to file taxes in 2008 must initial here: _____

Explanation:

- | | | |
|-----------|--------------------|---|
| 1a | \$ _____ | <p>Father's wages, salaries, tips, etc. (income from working)
2008 W-2 forms or 2008 IRS Form 1040 lines 7+12+18; 1040A line 7; 1040EZ line 1</p> |
| 1b | \$ _____ | <p>Spouse's (if any) wages, salaries, tips, etc. (income from working)
2008 W-2 forms or 2008 IRS Form 1040 lines 7+12+18; 1040A line 7; 1040EZ line 1</p> |
| 2 | \$ _____ | <p>Father's interest income
2008 IRS Form 1040 line 8a; 1040A line 8a; 1040EZ not applicable</p> |
| 3 | \$ _____ | <p>Father's dividend income
2008 IRS Form 1040 line 9a; 1040A line 9a; 1040EZ not applicable</p> |
| 4 | \$ _____ | <p>Father's Adjusted Gross Income (AGI)
2008 IRS Form 1040 line 37; 1040A line 21; 1040EZ line 4
If father is remarried and filed jointly, AGI must be adjusted. To adjust, subtract father's and spouse's wages or salaries from AGI and divide the remainder of the AGI by two. Then add father's wages or salaries back in and list the adjusted AGI to the left.
If father filed singly, simply list AGI as it appears on tax form.</p> |
| 5 | \$ _____ | <p>Child support received by father, if any
List yearly, not monthly, amount.</p> |
| 6 | \$ _____ | <p>Payments to tax-deferred pension and savings plans
W-2 forms, Box 12a through 12d, codes D, E, F, G, H, and S
Include untaxed payments to 401(k) and 403(b) plans.</p> |
| 7 | \$ _____ | <p>Contributions to pre-tax dependent care accounts
W-2 forms, box 10</p> |
| 8 | \$ _____ | <p>Father's federal income tax paid
2008 IRS Form 1040 line 61; 1040A line 37; 1040EZ line 7
Do not copy the amount of "federal income tax withheld" from a W-2 form.</p> |
| 9 | \$ _____ | <p>Child support paid by father, if any
List yearly, not monthly, amount.</p> |
| 10 | \$ _____ | <p>Credit for child and dependent care expenses claimed on federal taxes
2008 IRS Form 1040 line 48; 1040A line 29; 1040EZ not applicable</p> |
| 11 | \$ _____ | <p>Nonreimbursed medical or dental expenses claimed on federal taxes
2008 IRS Form 1040, Schedule A, line 4; Forms 1040A and 1040EZ not applicable</p> |
| 12 | _____ dependent(s) | <p>Dependents in college or will be attending college in 2010-11 academic year (excluding applicant)
Count each dependent who is a full-time undergraduate student. (Number of college students claimed must agree with the number listed in above table of father's household.) Do not include applicant.</p> |

2010 Undergraduate Transfer Scholarship Program

► FATHER'S ASSETS

- If the applicant's father is single, he should list all of his income and assets.
- If the applicant's father is remarried, he should list (1) all of his own income and benefits and (2) half the combined family assets.
- If the father owns assets jointly with others (not spouse), include only the portion of the assets that the father owns.

13 \$ _____ **Father's cash, savings and checking account balances** (as of today)
Include the total balance for all accounts.

14 \$ _____ **Father's investment equity** (as of today)
Include investments owned by the father and **not included** in the applicant's financial information form. Investments include money market funds, mutual funds, certificates of deposit, stocks, bonds, education IRAs, Uniform Gifts to Minors accounts, college savings plans, trusts, etc. Do not include the value of life insurance policies, retirement plans, savings or checking accounts, or the value of prepaid tuition plans.

15a \$ _____ **Father's home equity** (as of today)
If father is a homeowner, include **equity** of father's primary residence.
(Current value of home \$ _____ minus home debt \$ _____ equals equity \$ _____.)

15b _____ year(s) **(Father's home equity, continued)** How many **years** has the father owned the home?
Round up to the nearest year.

16 \$ _____ **Father's real estate equity (apart from main residence)** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any real estate owned by the father. **Do not include** real estate equity listed in the applicant's financial forms.

17 \$ _____ **Father's business and/or farm equity** (as of today)
Include the equity (current value \$ _____ minus debt \$ _____ equals equity \$ _____) of any business/farm owned by the father. **Do not include** business/farm equity listed in the applicant's financial forms.

18a \$ _____ **Father's retirement savings or pension assets** (as of today)
Include current value of retirement savings, such as IRA, Keogh, 401(k), 403(b), or other retirement plans.

18b \$ _____ **Father's pension assets** (as of this year)
Include the yearly amount received from all pension plans. Include all regular annuity payments.

The applicant's father may include an explanation as a PDF, (up to two pages long) about any **special financial circumstances** relevant to his income information, such as business losses, change in employment status, extraordinary medical expenses, expenses for disabled children, etc.

By signing below, I certify that all information provided in this financial information form is accurate to the best of my knowledge.

Father's or legal guardian's signature (required) Date

Stepmother's (if any) signature Date

Applicant must initial Date