

## Custodial Parent(s)/Guardian(s) Financial Form— Receipt Deadline: April 26, 2010

Think Big. Work Hard. Achieve.

Applicant name \_\_\_\_\_  
Last First

► **INSTRUCTIONS**

- As specified in the Application Guidelines, please write legibly using blue or black ink and use only the space allotted for your answers. See the Application Guidelines for other essential instructions.
- Use the information from your 2009 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.
- Attach a copy of your 2009 federal tax form(s), including W-2 form(s), schedules, and attachments.
- If the applicant was required to file a 2009 federal tax return, also attach a copy of his/her W-2 form(s), schedules, and attachments.
- You may include a signed note to explain any special financial circumstances relevant to your income information (e.g., business losses, extraordinary family medical expenses, expenses for disabled children).

**The student's biological or adoptive custodial parent(s)/guardian(s) (with whom the student resides full time or a greater portion of the time), should complete this form.** If the custodial parents/guardians remain married to one another, the financial information provided on this form should be the combined amount for the custodial parents/guardians. If the custodial parent/guardian has remarried, the stepparent's financial information should be included on this form; please note that whenever this form uses "you/your" or "parent(s)/guardian(s)," it also includes the stepparent. If there is a noncustodial parent/guardian, please refer to the instructions on the Noncustodial Parent(s)/Guardian(s) Financial Form.

- Check here if you were NOT required to file a federal tax return for 2009. In this case, please complete the form as best as possible and attach a statement from the employer(s) listing all income and benefits for the prior year.**
- Check here if you live abroad and did not file U.S. taxes. In this case, please complete the form as best as possible and attach a statement (in English or a certified translation into English) from each parent's/guardian's employer listing all income and benefits for the prior year.**

► **2009-10 PRIVATE/PAROCHIAL SCHOOL AND COLLEGE TUITION**

Please complete the chart below indicating the total 2009-10 private/parochial school and college tuition costs for each member of your household (including anyone claimed as a dependent on your federal taxes [2009 IRS Form 1040 line 6c or 1040A line 6c], AND others living in the household who receive more than half of their financial support from you during the 2009-10 academic year). Please mark N/A where appropriate.

Full name of household member	School/College name	Grade/year in school/college	Total cost of tuition for 2009-10	Specify amount of tuition paid for by:			
				Parent(s)/guardian(s)	Financial aid	Loans	Other*

\*Please name other source(s) of tuition funds (e.g., friend or relative name and relationship or organization):

\_\_\_\_\_

I/We expect the tuition amounts listed above to change significantly for the 2010-11 academic year.

- Yes       No

If "yes," please attach a note of explanation.

## Custodial Parent(s)/Guardian(s) Financial Form (continued)

Applicant name \_\_\_\_\_  
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### ► SCHOLARSHIPS (UNRELATED TO PRIVATE/PAROCHIAL SCHOOL TUITION)

Please complete the chart below indicating the amount of scholarships larger than \$250 that the applicant (or you on behalf of the applicant) has received in the past two years to pay for expenses (e.g., summer programs, camp, lessons, tutoring) *not including scholarships for private/parochial school tuition*. Include payments made directly to the providers. Please mark N/A where appropriate. If more space is needed to complete this chart, please attach a separate sheet.

Name of scholarship provider	Opportunity paid for	Amount awarded

### ► MONETARY GIFTS (UNRELATED TO PRIVATE/PAROCHIAL SCHOOL TUITION)

Please complete the chart below indicating the amount gifted (including monetary gifts from abroad) larger than \$250 that the applicant (or you on behalf of the applicant) has received in the past two years *not including gifts for private/parochial school tuition*. Include payments made directly to the providers. Please mark N/A where appropriate. If more space is needed to complete this chart, please attach a separate sheet.

Name of person and relationship to the applicant, providing the funds	Opportunity paid for	Amount gifted

### ► PARENT(S)/GUARDIAN(S) 2009 INCOME AND BENEFITS

1 \$ \_\_\_\_\_ **Parent(s)/guardian(s) Adjusted Gross Income (AGI)**  
 2009 IRS Form 1040 line 37; 1040A line 21; 1040EZ line 4

2 \$ \_\_\_\_\_ **Parent(s)/guardian(s) untaxed income**  
 Complete all applicable fields below.

- \$ \_\_\_\_\_ Cash support, gifts received, or money paid on your behalf (*from relatives or nonrelatives*) larger than \$250 (*use total from Monetary Gifts chart above*)
- \$ \_\_\_\_\_ Social Security benefits
- \$ \_\_\_\_\_ Disability benefits
- \$ \_\_\_\_\_ Housing, food, and other living allowances (*excluding rent subsidies for low-income housing*) paid on your behalf or to you as a member of the military or clergy, (*including cash payments and cash value of benefits*), OR contributions to your household income provided by other nondependent members
- \$ \_\_\_\_\_ Welfare benefits, veterans benefits, workers compensation
- \$ \_\_\_\_\_ Household expenses and any money paid by separated or divorced spouse in lieu of child support
- \$ \_\_\_\_\_ Income earned abroad (*Foreign Income Exclusion, IRS Form 2555, or 2555EZ*)

3 \$ \_\_\_\_\_ **Child support received by parent(s)/guardian(s), if any**  
 List yearly, not monthly, amount.

## Custodial Parent(s)/Guardian(s) Financial Form (continued)

Applicant name \_\_\_\_\_  
Last First

- 4 \$ \_\_\_\_\_ **Payments to tax-deferred pension and savings plans**  
 W-2 Forms, box 12a through 12d, codes D, E, F, H, and S  
 Include untaxed payments to 401(k) and 403(b) plans.
- 5 \$ \_\_\_\_\_ **Contributions to pre-tax dependent care accounts**  
 W-2 Forms, box 10
- 6 \$ \_\_\_\_\_ **Parent(s)/guardian(s) federal income tax paid**  
 2009 IRS Form 1040 line 60; 1040A line 37; 1040EZ line 11  
*Do not copy the amount of "federal income tax withheld" from a W-2 Form.*
- 7 \$ \_\_\_\_\_ **Child support paid by parent(s)/guardian(s), if any**  
 List yearly, not monthly, amount.
- 8 \$ \_\_\_\_\_ **Child tax credit claimed on federal taxes**  
 2009 IRS Form 1040 line 65 or 1040A line 42; 1040EZ not applicable
- 9 \$ \_\_\_\_\_ **Nonreimbursed medical or dental expenses claimed on federal taxes**  
 2009 IRS Form 1040, Schedule A, line 4; Forms 1040A and 1040EZ not applicable
- 10 \_\_\_\_\_ **Number of dependents in college**  
 Count each dependent who is a full-time undergraduate student.

► **PARENT(S)/GUARDIAN(S) ASSETS**

If you have assets jointly owned with other individuals, include only the portion of the assets that you own.

- 11 \$ \_\_\_\_\_ **Parent(s)/guardian(s) cash, savings, and checking account balances (as of today)**  
 Include the total balance for all accounts.
- 12 \$ \_\_\_\_\_ **Parent(s)/guardian(s) investment equity (as of today)**  
 Include investments owned by the parent(s)/guardian(s) and not included in the student's financial information section.  
**For example, include:** college savings plans, trusts, money market funds, mutual funds, certificates of deposit, stocks, bonds, education IRAs, and Uniform Gifts to Minors accounts.  
**Do not include:** the value of life insurance policies, retirement plans, savings or checking accounts, or prepaid tuition plans, or investments held in student's name.
- 13 \$ \_\_\_\_\_ **Parent(s)/guardian(s) home equity (as of today)**  
 If parent(s)/guardian(s) own a home, include equity of the primary residence. (Current assessed value minus debt equals equity.) Complete all fields below.  
 Current assessed value of home \$ \_\_\_\_\_  
 Home debt \$ \_\_\_\_\_  
 Year purchased home \_\_\_\_\_  
 Purchase price \$ \_\_\_\_\_
- 14 \$ \_\_\_\_\_ **Parent(s)/guardian(s) investment real estate equity (apart from main residence) (as of today)**  
 Include the equity of any real estate owned by the parent(s)/guardian(s) and not included in the student's financial information section. (Current assessed value minus debt equals equity.) Complete all fields below.  
 Current assessed value of real estate \$ \_\_\_\_\_  
 Real estate debt \$ \_\_\_\_\_  
 Year purchased real estate \_\_\_\_\_  
 Purchase price \$ \_\_\_\_\_

## Custodial Parent(s)/Guardian(s) Financial Form (continued)

Applicant name \_\_\_\_\_  
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**15** \$ \_\_\_\_\_ **Parent(s)/guardian(s) business and/or farm equity (as of today)**  
 If self-employed, please complete the Supplemental Self-Employment Form and note 2009 business equity total from question 7 here.

**16** \$ \_\_\_\_\_ **Parent(s)/guardian(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 or pension plans.

► **STUDENT'S 2009 INCOME AND BENEFITS**

**1** \$ \_\_\_\_\_ **Student's Adjusted Gross Income (AGI)**  
 2009 IRS Form 1040 line 37; 1040A line 21; 1040EZ line 4

**2** \$ \_\_\_\_\_ **Student's untaxed income**  
 Complete all applicable fields below.

- \$ \_\_\_\_\_ Cash support, gifts received, or money paid on your behalf (*from relatives or nonrelatives*) larger than \$250 (*do not include those amounts counted in parent/guardian untaxed income*)
- \$ \_\_\_\_\_ Social Security benefits
- \$ \_\_\_\_\_ Welfare benefits, veterans benefits, workers compensation

► **STUDENT'S ASSETS**

If the student has assets jointly owned with other individuals, include only the portion of the assets that the student owns.

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

**4** \$ \_\_\_\_\_ **Student's investment equity (as of today)**  
 Include investments owned by the student and not included in the parent(s)/guardian(s) financial information section.

**For example, include:** real estate equity, business and/or farm equity, college savings plans, trusts, money market funds, mutual funds, certificates of deposit, stocks, bonds, education IRAs, and Uniform Gifts to Minors accounts.

**Do not include:** the value of life insurance policies, retirement plans, savings or checking accounts, or prepaid tuition plans, or investments held in student's name.

► **CERTIFICATION**

- I/we certify that all information provided on this Financial Form is accurate to the best of my/our knowledge.
- I/we understand that any work submitted that is not accurate, original, and honest may result in my/our child's dismissal from the Young Scholar Program.

\_\_\_\_\_  
 Custodial Parent's/Guardian's Signature (required) Date

\_\_\_\_\_  
 Other Custodial Parent's/Guardian's/Stepparent's Signature (required if applicable) Date