

Noncustodial Parent(s)/Guardian(s) Financial Form – Receipt Deadline: April 26, 2010

Applicant name _____
Last First

If applicable, the noncustodial biological or adoptive parent/guardian should complete this form. If the noncustodial 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.

This form may be submitted separately from the rest of the application. If submitting separately, the form and attachments **MUST BE RECEIVED** at the address below by **April 26, 2010** in order for the student's application to be considered eligible.

**Jack Kent Cooke Foundation
Young Scholars Program
301 ACT Drive, PO Box 4030
Iowa City, IA 52243
1-800-498-6478 (for use on overnight delivery forms)**

► INSTRUCTIONS

- If you do not have a copy of the Application Guidelines, please download them from the Foundation's website*.
 - 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.
 - Please complete this form and attach a copy of your 2009 tax form(s) (including W-2 forms, schedules, and attachments).
 - Do not include income or assets belonging to the applicant on this form; that information is requested on the Custodial Parent(s)/Guardian(s) Financial Form.
 - 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).
- 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 noncustodial parent's/guardian's employer listing all income and benefits for the prior year.**

► NONCUSTODIAL PARENT(S)/GUARDIAN(S) HOUSEHOLD INFORMATION

Noncustodial Parent(s)/Guardian(s): _____
Last First Dr. Mr. Mrs. Ms.

Address _____

City _____ State _____ Zip _____

Home phone _____ Work or cellular phone _____

Noncustodial Parent(s)/Guardian(s) Financial Form (continued)

Applicant name Last _____ First _____

List members of your household in the table below. For "other," include only those household members claimed as a dependent on your federal taxes [2009 IRS Form 1040 line 6c or 1040A line 6c]. Do NOT include the applicant, even if you claim him/her as a dependent. If more space is needed to complete this chart please attach a separate sheet.

Full name of household member	Age
Noncustodial Parent/Guardian	
Noncustodial Parent/Guardian/Stepparent	
Other	
Other	
Other	

► 2009-10 PRIVATE/PAROCHIAL SCHOOL AND COLLEGE TUITION

Please complete the chart below indicating the total 2009-10 private/parochial 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). Do NOT include the applicant, even if you claim him/her as a dependent.

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:			
				Noncustodial 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.

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

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

2 \$ _____ **Noncustodial 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
- \$ _____ Social Security benefits
- \$ _____ Disability benefits

Noncustodial Parent(s)/Guardian(s) Financial Form (continued)

Applicant name Last _____ First _____

<p>3 \$ _____</p> <p>4 \$ _____</p> <p>5 \$ _____</p> <p>6 \$ _____</p> <p>7 \$ _____</p> <p>8 \$ _____</p> <p>9 \$ _____</p> <p>10 \$ _____</p>	<ul style="list-style-type: none"> ▪ \$ _____ Housing, food, and other living allowances (<i>excluding rent subsidies for low-income housing</i>) paid on your behalf or to you as a member of the military or clergy, (<i>including cash payments and cash value of benefits</i>), 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 (<i>Foreign Income Exclusion, IRS Form 2555, or 2555EZ</i>) <p>Child support received by noncustodial parent(s)/guardian(s), if any List yearly, not monthly, amount.</p> <p>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.</p> <p>Contributions to pre-tax dependent care accounts W-2 Forms, box 10</p> <p>Noncustodial parent(s)/guardian(s) federal income tax paid 2009 IRS Form 1040 line 60; 1040A line 37; 1040EZ line 11 <i>Do not copy the amount of "federal income tax withheld" from a W-2 Form.</i></p> <p>Child support paid by noncustodial parent/guardian, if any List yearly, not monthly, amount.</p> <p>Child tax credit claimed on federal taxes 2009 IRS Form 1040 line 65 or 1040A line 42; 1040EZ not applicable</p> <p>Nonreimbursed medical or dental expenses claimed on federal taxes 2009 IRS Form 1040, Schedule A, line 4; Forms 1040A and 1040EZ not applicable</p> <p>Number of dependents in college Count each dependent who is a full-time undergraduate student.</p>
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► NONCUSTODIAL PARENT(S)/GUARDIAN(S) ASSETS

List all assets owned by noncustodial parent/guardian, or assets owned jointly with stepparent. If assets are owned jointly with others (not spouse), include only the portion of the assets that the noncustodial parent(s) guardian(s) and/or stepparent own(s).

<p>11 \$ _____</p> <p>12 \$ _____</p>	<p>Noncustodial parent(s)/guardian(s) cash, savings, and checking account balances (as of today) Include the total balance for all accounts.</p> <p>Noncustodial parent(s)/guardian(s) investment equity (as of today) 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.</p>
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13 \$ _____

Noncustodial parent(s)/guardian(s) home equity (as of today)

If noncustodial 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 \$ _____

Noncustodial parent(s)/guardian(s) investment real estate equity (apart from main residence) (as of today)

(Current assessed value minus debt equals equity.) Complete all fields below.

Current assessed value of investment real estate \$ _____

Investment real estate debt \$ _____

Year purchased investment real estate _____

Purchase price \$ _____

15 \$ _____

Noncustodial 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 \$ _____

Noncustodial 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.

► **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 Scholars Program.

Noncustodial Parent's/Guardian's Signature (required)

Date

Stepparent's Signature (required if applicable)

Date