



This document is for those parents who wish to prepare their financial data on paper before entering it onto the Need Access Web Application. If parents are separated or divorced, the main supporting parent (and stepparent, if applicable) should complete the PARENT form. The other parent (and stepparent, if applicable) should complete the DIVORCED/SEPARATED PARENT form. Do not return this worksheet to Need Access.

Student Name: \_\_\_\_\_ Student SSN: \_\_\_\_\_

**Parent's General Information**

	(61) Father	(62) Mother
a. Parent in Household (1=Yes, 2=No):	_____	_____
Deceased (1=Yes, 2=No):	_____	_____
b. Relationship to student: (1=Father/Mother, 2=Stepparent, 3=Guardian, 4=None, 5=Other)	_____	_____
c. Name:	_____	_____
Date of Birth:	_____	_____
d. Street:	_____	_____
City/State/Zip	_____ / _____ / _____	_____ / _____ / _____
h. Country:	_____	_____
i. Occupation:	_____	_____
j. Title:	_____	_____
k-m. Employer:	_____	_____
Years:	_____	_____
n-o. Retirement Plans (1=Yes, 2=No): Social Security: _____ Other: _____ Social Security: _____ Other: _____		
62p. Name of parent who last claimed student as tax dependent:	_____	
62q. Last year claimed:	_____	
62r. If student discusses financial aid application with the school's financial aid officer, do you authorize the officer to disclose your information to the student? (1=Yes, 2=No):	_____	

**Parent's Household Information**

62s. Number of Family Members: _____	62t. Number in College: _____
62v. Parent's current marital status: _____ (1=Single, 2=Married, 3=Separated, 4=Divorced, 5=Widowed)	62u. Parents in College: _____
62w. Date of parent's divorce/separation (Month/Year): _____ / _____	
62wr. Date of parent's remarriage (Month/Year): _____ / _____	
62x. Parent's state of legal residence: _____	62y. Parents Phone Number _____

## Parent's Annual Income and Expense Figures

Please complete the table by entering the annual amounts in whole dollars only.

	2006	2007
63, 4a. Source of Following U.S. Tax Figures:	_____	_____
1 = Completed 1040A or 1040EZ		
2 = Completed 1040		
3 = Estimated 1040A or 1040EZ		
4 = Estimated 1040		
5 = Tax return will not be filed		
6 = Completed 1040NR		
7 = Estimated 1040NR		
63, 4b. Number of Exemptions:	_____	_____
63, 4c. Adjusted gross income from IRS form:	\$ _____	\$ _____
63, 4d. Itemized deductions (1040 Schedule A):	\$ _____	\$ _____
63, 4e. U.S. income tax paid:	\$ _____	\$ _____
63, 4f. Father's earned income from work:	\$ _____	\$ _____
63, 4g. Mother's earned income from work:	\$ _____	\$ _____
63, 4h. Interest income:	\$ _____	\$ _____
63, 4i. Dividend income:	\$ _____	\$ _____
63, 4j. Other taxable income:	\$ _____	\$ _____
<b>Untaxed income and benefits</b>		
63, 4k. Earned income credit:	\$ _____	\$ _____
63, 4m. Social Security benefits:	\$ _____	\$ _____
63, 4n. AFDC:	\$ _____	\$ _____
63, 4o. Child support received:	\$ _____	\$ _____
63, 4p. Other untaxed income/benefits:	\$ _____	\$ _____
63, 4q. Medical/dental expenses:	\$ _____	\$ _____
63, 4r. Elementary/junior high/high school tuition:	\$ _____	\$ _____
63, 4s. Number of children paid for:	_____	_____
<b>Income exclusions</b>		
63, 4t. Child support paid by you:	\$ _____	\$ _____
63, 4u. Education credits received:	\$ _____	\$ _____
63, 4v. Financial aid reported as income:	\$ _____	\$ _____

## Parent's Assets

Please complete the table by entering the annual amounts in whole dollars only.

	Value	Debt
66a. Cash, savings, and checking accounts:	\$ _____	\$ _____
66b-c. Home:	\$ _____	\$ _____
66d. If home is owned, year purchased: _____		
66e. and purchased price: \$ _____		
66f-g. Other real estate:	\$ _____	\$ _____
66h-i. Investments:	\$ _____	\$ _____
66j-k. Business:	\$ _____	\$ _____
66m-n. Farm:	\$ _____	\$ _____
66o. Family lives on farm: (1 = Yes, 2 = No)	_____	
66p. Retirement Accounts (IRA/Keogh/etc):	\$ _____	\$ _____

### Parent's Household Expenses

- 69a. Monthly rent/mortgage amount: \$ \_\_\_\_\_
- 69b. Local income and property taxes: \$ \_\_\_\_\_
- 69c. Parents own/lease a vehicle: (1=own, 2=lease, 3=own/lease, 4=none) \_\_\_\_\_
- 69d-f. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_
- 69g-i. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_
- 69j. Total vehicle indebtedness as of December 31, 2006: \$ \_\_\_\_\_
- 69k. Total monthly vehicle payments: \$ \_\_\_\_\_

### Parent's Household Information

	(71) Father	(72) Mother	(73) Other 1	(74) Other 2
a. Name:	_____	_____	_____	_____
b. Age	_____	_____	_____	_____
c. Relationship:	_____	_____	_____	_____
<small>1=Student's parent      2=Student's brother/sister 3=Student's spouse      4=Student's son/daughter 5=Student's grandparent      6=Other</small>				
<b>2007-2008 Academic Year</b>				
d. College student?: (1=Yes, 2=No)	_____	_____	_____	_____
e. Institution Name:	_____	_____	_____	_____
f. Class in school:	_____	_____	_____	_____
g. Aid from parents?:	_____	_____	_____	_____
<b>2006-2007 Academic Year</b>				
h. Institution name:	_____	_____	_____	_____
i. Tuition, fees, etc:	_____	_____	_____	_____
j. Scholarships, etc:	_____	_____	_____	_____
k. Loans, employment:	_____	_____	_____	_____
m. Aid from parents last year:	_____	_____	_____	_____
	(75) Other 3	(76) Other 4	(77) Other 5	(78) Other 6
a. Name:	_____	_____	_____	_____
b. Age	_____	_____	_____	_____
c. Relationship:	_____	_____	_____	_____
<small>1=Student's parent      2=Student's brother/sister 3=Student's spouse      4=Student's son/daughter 5=Student's grandparent      6=Other</small>				
<b>2007-2008 Academic Year</b>				
d. College student?: (1=Yes, 2=No)	_____	_____	_____	_____
e. Institution Name:	_____	_____	_____	_____
f. Class in school:	_____	_____	_____	_____
g. Aid from parents?:	_____	_____	_____	_____
<b>2006-2007 Academic Year</b>				
h. Institution name:	_____	_____	_____	_____
i. Tuition, fees, etc:	_____	_____	_____	_____
j. Scholarships, etc:	_____	_____	_____	_____
k. Loans, employment:	_____	_____	_____	_____
m. Aid from parents last year:	_____	_____	_____	_____

