



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**

	(31) Father	(32) 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: _____
32p. Name of parent who last claimed student as tax dependent:	_____	
32q. Last year claimed:	_____	
32r. 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**

32s. Number of Family Members: _____	32t. Number in College: _____
32v. Parent's current marital status: _____ (1=Single, 2=Married, 3=Separated, 4=Divorced, 5=Widowed)	32u. Parents in College: _____
32w. Date of parent's divorce/separation (Month/Year): _____ / _____	
32wr. Date of parent's remarriage (Month/Year): _____ / _____	
32x. Parent's state of legal residence: _____	32y. Parent's Phone Number _____

## Parent's Annual Income and Expense Figures

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

	2006	2007
<b>33, 4a. Source of Following U.S. Tax Figures:</b>	_____	_____
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		
<b>33, 4b. Number of Exemptions:</b>	_____	_____
<b>33, 4c. Adjusted gross income from IRS form:</b>	\$ _____	\$ _____
<b>33, 4d. Itemized deductions (1040 Schedule A):</b>	\$ _____	\$ _____
<b>33, 4e. U.S. income tax paid:</b>	\$ _____	\$ _____
<b>33, 4f. Father's earned income from work:</b>	\$ _____	\$ _____
<b>33, 4g. Mother's earned income from work:</b>	\$ _____	\$ _____
<b>33, 4h. Interest income:</b>	\$ _____	\$ _____
<b>33, 4i. Dividend income:</b>	\$ _____	\$ _____
<b>33, 4j. Other taxable income:</b>	\$ _____	\$ _____
<b>Untaxed income and benefits</b>		
33, 4k. Earned income credit:	\$ _____	\$ _____
33, 4m. Social Security benefits:	\$ _____	\$ _____
33, 4n. AFDC:	\$ _____	\$ _____
33, 4o. Child support received:	\$ _____	\$ _____
33, 4p. Other untaxed income/benefits:	\$ _____	\$ _____
33, 4q. Medical/dental expenses:	\$ _____	\$ _____
33, 4r. Elementary/junior high/high school tuition:	\$ _____	\$ _____
33, 4s. Number of children paid for:	_____	_____
<b>Income exclusions</b>		
33, 4t. Child support paid by you:	\$ _____	\$ _____
33, 4u. Education Credit received:	\$ _____	\$ _____
33, 4v. Financial aid reported as income:	\$ _____	\$ _____

## Parent's Assets

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

	Value	Debt
36a. Cash, savings, and checking accounts:	\$ _____	\$ _____
36b-c. Home:	\$ _____	\$ _____
36d. If home is owned, year purchased: _____		
36e. and purchased price: \$ _____		
36f-g. Other real estate:	\$ _____	\$ _____
36h-i. Investments:	\$ _____	\$ _____
36j-k. Business:	\$ _____	\$ _____
36m-n. Farm:	\$ _____	\$ _____
36o. Family lives on farm: (1 = Yes, 2 = No)	_____	
36p. Retirement Accounts (IRA/Keogh/etc):	\$ _____	\$ _____

### Parent's Household Expenses

- 39a. Monthly rent/mortgage amount: \$ \_\_\_\_\_
- 39b. Local income and property taxes: \$ \_\_\_\_\_
- 39c. Parents own/lease a vehicle: (1=own, 2=lease, 3=own/lease, 4=none) \_\_\_\_\_
- 39d-f. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_
- 39g-i. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_
- 39j. Total vehicle indebtedness as of December 31, 2006: \$ \_\_\_\_\_
- 39k. Total monthly vehicle payments: \$ \_\_\_\_\_

### Parent's Household Information

	(41) Father	(42) Mother	(43) Other 1	(44) 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:	_____	_____	_____	_____
	(45) Other 3	(46) Other 4	(47) Other 5	(48) 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:	_____	_____	_____	_____

