

## 2012 – 2013 Parent Information Worksheet

- Use this worksheet if you prefer to prepare your financial data on paper before entering it in the online Need Access Application at [www.needaccess.org](http://www.needaccess.org). Do not mail or fax a paper worksheet to Access Group.
- 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 **Non-Custodial Parent Form**.
- For guidance, be sure to refer to the **Parent Information Worksheet Instructions** that accompany this worksheet. For questions where these **Instructions** provide a list of possible answers, enter the applicable answer in this worksheet. For example, for question 32v, which asks the parents' Current Marital Status, fill in the applicable choice, such as Single, Married, Separated, Divorced, or Widowed. (Do not enter the number shown.)
- Please enter all dollar amounts in whole dollars only.

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

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

### Parents/Stepparents/Guardian Information

	(31) Father/Stepfather/Guardian	(32) Mother/Stepmother/Guardian
31a, 32a. Parent in This Parents' Household Yes, No):	_____	_____
31ad, 32ad Parent...Deceased (Yes, No):	_____	_____
31ay, 32ay Year Parent/Stepparent/Guardian Died:	_____	_____
31b, 32b Relationship to Student:	_____	_____
31c, 32c Name:	_____	_____
31m, 32m Date of Birth:	_/_/____	_/_/____
31d, 32d Street:	_____	_____
31e, 32e City:	_____	_____
31f, 32f State:	_____	_____
31g, 32g Zip Code:	_____	_____
31h, 32h Territory/Country:	_____	_____
c237pf, c237pm Parent's E-Mail Address:	_____	_____
31i, 32i Occupation:	_____	_____
31j, 32j Job Title:	_____	_____
31k, 32k Employer:	_____	_____
31m, 32m Number of Years with this Employer:	_____	_____

## Parents' Household Information

32p. Phone Number: (\_\_\_\_) \_\_\_\_\_

32pe. Parents' E-mail Address: \_\_\_\_\_

32qp. Parent Last Claimed Student as Dependent: \_\_\_\_\_ 32qv. Last Year Claimed: \_\_\_\_\_

32r. Parents' Release of Financial Data (Yes, No): \_\_\_\_\_

32s. Number of Family Members Financially Supported by Parents: \_\_\_\_\_

32t. Number in College in 2012-2013: \_\_\_\_\_ 32u. Number of Parents in College: \_\_\_\_\_

32v. Current Marital Status: \_\_\_\_\_

32wm, 32wy Date of Divorce/Separation: Month \_\_\_\_ Year \_\_\_\_

32wrm, 32wry. Date of Remarriage: Month \_\_\_\_ Year \_\_\_\_

32x. State of Legal Residence: \_\_\_\_\_

c20p. Parents Living Abroad: \_\_\_\_\_ 32z. Income from Non-U.S. Sources in 2011 (Yes/No): \_\_\_\_\_

## Parents' Income and Expenses

*Schools may require one or both years of income and expense data.*

	<b>2011</b>	<b>2012 (Estimated)</b>
33, 34a. Source of Following U.S. Tax Figures:	_____	_____
Completed IRS Form 1040A or 1040EZ; Completed IRS Form 1040; Estimated IRS Form 1040A or 1040EZ;		
Estimated IRS Form 1040; Tax return will not be filed; Completed IRS Form 1040NR, Estimated IRS Form 1040NR		
33, 34b. Number of Exemptions:	_____	_____
33, 34c. Adjusted Gross Income from IRS Form:	\$ _____	\$ _____
33, 34d. Itemized Deductions (1040 Schedule A):	\$ _____	\$ _____
33, 34e. U.S. Income Tax Paid:	\$ _____	\$ _____
33, 34f. Father's Earned Income:	\$ _____	\$ _____
33, 34g. Mother's Earned Income:	\$ _____	\$ _____
33, 34h. Interest Income:	\$ _____	\$ _____
33, 34i. Dividend Income:	\$ _____	\$ _____
33,34j. Other Taxable Income:	\$ _____	\$ _____
33, 34k. Earned Income Credit:	\$ _____	\$ _____
33, 34m. Social Security Benefits:	\$ _____	\$ _____
33, 34n. AFDC/TANF:	\$ _____	\$ _____
33, 34o. Child Support Received:	\$ _____	\$ _____
33, 34p. Other Untaxed Income/Benefits:	\$ _____	\$ _____
33, 34q. Medical/Dental Expense:	\$ _____	\$ _____
33, 34r. Elementary/Junior/High School Tuition:	\$ _____	\$ _____
33s ,34s. Number of Children's Tuition Paid for:	_____	_____
33, 34t. Child Support Paid:	\$ _____	\$ _____
33, 34u. Education Credits Received:	\$ _____	\$ _____
33, 34v. Taxable Income Exclusion:	\$ _____	\$ _____

## Parents' Assets

	Value	Debt
36a. Cash, Savings, and Checking Accounts (Today):	\$ _____	
36b, 36c. If Home is Owned, Home:	\$ _____	\$ _____
36d. If Home is Owned, Year Purchased:	_____	
36e. If Home is Owned, Home Purchase Price:	\$ _____	
36f, 36g. Other Real Estate	\$ _____	\$ _____
36h, 36i. Investments	\$ _____	\$ _____
36j, 36k. Business:	\$ _____	\$ _____
36Ka. Small Family-Run Business (Yes, No):	_____	
36m, 36n. Farm:	\$ _____	\$ _____
36o. Family Lives on Farm (Yes, No):	_____	
36p. Retirement Accounts Value:	\$ _____	

## Parents' Household Expenses

39a. Home Monthly Rent/Mortgage	\$ _____	39b. Local Income/Property Taxes – 2011	\$ _____
39c. Own or Lease a Vehicle: (Own, Lease, Own and Lease, None): _____			
Vehicle 1. 39d. Model Year:	_____	39e. Make:	_____
		39f. Model:	_____
Vehicle 2. 39g. Model Year:	_____	39h. Make:	_____
		39i. Model:	_____
39j. Total Vehicle Indebtedness:	\$ _____	39.k. Total Monthly Vehicle Payments:	\$ _____

## Parents' Household Members

### (41) Father/Stepfather/Guardian Information

41d. College Student (Yes, No): \_\_\_\_\_

41e. School/College/Institution: \_\_\_\_\_

41f. Class – 2012-2013: \_\_\_\_\_

41n. Tuition and Fees for 2012-2013 \$ \_\_\_\_\_

### (42) Mother/Stepmother/Guardian Information

42d. College Student (Yes, No): \_\_\_\_\_

42e. School/College/Institution: \_\_\_\_\_

42f. Class – 2012-2013: \_\_\_\_\_

42n. Tuition and Fees for 2012-2013 \$ \_\_\_\_\_

## Parents' Other Household Members (Relationship: Student's parent/stepparent, Student's brother/sister, Student's spouse, Student's son/daughter, Student's grandparent, Other)

### (43) Parents' Other Household Member 1

43a. Name: \_\_\_\_\_

43b. Age: \_\_\_\_\_

43c. Relationship to Student: \_\_\_\_\_

43d. College Student 2012-2013 (Yes, No): \_\_\_\_\_

43e. School/College/Institution 2012-2013: \_\_\_\_\_

43f. Class – 2012-2013: \_\_\_\_\_

43g. Assistance from Parents – 2012-2013: \$ \_\_\_\_\_

43h. School/College/Institution 2011-2012: \_\_\_\_\_

43m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**(44) Parents' Other Household Member 2**

44a. Name: \_\_\_\_\_  
44b. Age: \_\_\_\_\_  
44c. Relationship to Student: \_\_\_\_\_  
44d. College Student 2012-2013 (Yes, No): \_\_\_\_\_  
44e. School/College/Institution 2012-2013: \_\_\_\_\_  
44f. Class – 2012-2013: \_\_\_\_\_  
44g. Assistance from Parents – 2012-2013: \$ \_\_\_\_\_  
44h. School/College/Institution 2011-2012: \_\_\_\_\_  
44m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**(45) Parents' Other Household Member 3**

45a. Name: \_\_\_\_\_  
45b. Age: \_\_\_\_\_  
45c. Relationship to Student: \_\_\_\_\_  
45d. College Student 2012-2013 (Yes, No) : \_\_\_\_\_  
45e. School/College/Institution 2012-2013: \_\_\_\_\_  
45f. Class – 2012-2013: \_\_\_\_\_  
45g. Assistance from Parents – 2012-2013: \$ \_\_\_\_\_  
45h. School/College/Institution 2011-2012: \_\_\_\_\_  
45m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**(46) Parents' Other Household Member 4**

46a. Name: \_\_\_\_\_  
46b. Age: \_\_\_\_\_  
46c. Relationship to Student: \_\_\_\_\_  
46d. College Student 2012-2013 (Yes, No) : \_\_\_\_\_  
46e. School/College/Institution 2012-2013: \_\_\_\_\_  
46f. Class – 2012-2013: \_\_\_\_\_  
46g. Assistance from Parents – 2012-2013: \$ \_\_\_\_\_  
46h. School/College/Institution 2011-2012: \_\_\_\_\_  
46m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**(47) Parents' Other Household Member 5**

47a. Name: \_\_\_\_\_  
47b. Age: \_\_\_\_\_  
47c. Relationship to Student: \_\_\_\_\_

47d. College Student 2012-2013 (Yes, No): \_\_\_\_\_  
47e. School/College/Institution 2012-2013: \_\_\_\_\_  
47f. Class – 2012-2013: \_\_\_\_\_  
47g. Assistance from Parents -- 2012-2013: \$ \_\_\_\_\_  
47h. School/College/Institution 2011-2012: \_\_\_\_\_  
47m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**(48) Parents' Other Household Member 6**

48a. Name: \_\_\_\_\_  
48b. Age: \_\_\_\_\_  
48c. Relationship to Student: \_\_\_\_\_  
48d. College Student 2012-2013 (Yes, No): \_\_\_\_\_  
48e. School/College/Institution 2012-2013: \_\_\_\_\_  
48f. Class – 2012-2013: \_\_\_\_\_  
48g. Assistance from Parents – 2012-2013: \$ \_\_\_\_\_  
48h. School/College/Institution 2011-2012: \_\_\_\_\_  
48m. Assistance from Parents – Last Year: \$ \_\_\_\_\_

**Parent's Special Circumstances**

59. Please describe your special circumstances below. \_\_\_\_\_  
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