

Following are instructions for completing the Parent Information Worksheet.

Parent's General Information

31a. Father in Household:

Enter the number corresponding to the answer of the following question: Is there a father, stepfather or male guardian in this household? (1=Yes, 2=No)

31ad, ay. Father Deceased:

Enter the number corresponding to the answer of the following questions: Is the father, stepfather or male guardian in this household deceased? (1=Yes, 2=No)

32a. Mother in Household:

Enter the number corresponding to the answer of the following question? Is the mother, stepmother or female guardian in this household? (1=Yes, 2=No)

32ad, ay. Mother Deceased:

Enter the number corresponding to the answer of the following question? Is the mother, stepmother or female guardian in this household deceased? (1=Yes, 2=No)

31, 32b. Relationship to the Student:

For each parent enter the number (1 to 4) corresponding to the relationship of the appropriate parent of the student. (1=Father/Mother, 2=Steparent, 3=Guardian, 4=None)

If there is no father/stepfather/male guardian in the household, leave the entries under "Father" blank.

If there is no mother/stepmother/female guardian in the household, leave the entries under "Mother" blank.

31, 32c-h. Parent's Name, Age and Address:

For each parent, enter the name, age and home address. For non-U.S. addresses, enter the name of the territory and/or country.

31, 32i-m. Occupation, Title, Employer, Years:

For each parent, enter the current occupation, title, employer and the number of years with that employer. (If employed less than one year, enter "0".) Leave these items blank if the parent is not employed or retired.

32qp. Name of the Parent who Last Claimed Student as Tax Dependent:

Enter the name of the parent who most recently claimed the student applicant as a dependent for U.S. income tax purposes.

32qy. Last Year Claimed:

Enter the last two digits of the year in which the student applicant was most recently claimed by a parent as a dependent for U.S. tax income purposes.

32r. Release Parent Financial Data for Discussion with Student:

Enter the number corresponding to the answer to the following questions: If the student discusses the 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)

32s. Number of Family Members:

Enter the number of people that the parents will support between July 1, 2008 and June 30, 2009. (Always include the student applicant). Include at least the following:

- 3 = 2 parents (married) + Student Applicant
- 2 = 1 parent (single, divorced, sep, widowed) + Student App

Include the parents' other children if they receive more than half their support from the parents. Include other people only if they now live with and receive more than half their support from the parents and will continue to receive this support between July 1, 2008 and June 30, 2009.

If the student is completing this section for the parents be sure not to include any dependents of the student. This question is for dependents of the parents only.

32t. Number in College:

Enter the number of people from the previous question, including the student applicant, who will be attending college, Graduate/professional School, or other school beyond the high school level between July 1, 2008 and June 30, 2009. Include other students if they are enrolled at least half-time for at least

one term. Include only students who are working toward a degree or certificate leading to a recognized education credential at a college that is eligible to participate in any of the federal student aid programs.

32u. Parents in College:

Of the number of college students entered in the previous question enter here the number that are the parents of the student applicant. That is, how many of the student applicant's parents will be attending college at least halftime in 2008-2009? Enter 0, 1 or 2.

32v. Parents' Current Marital Status:

Enter the number corresponding to the parents' current marital status. (1=Single, 2=Married, 3=Separated, 4=Divorced, 5=Widowed, 6=Domestic Partner)

32w. Date of Parents' Divorce/Separation:

Enter the month and year the parents were divorced or separated.

32wr. Date of Remarriage:

Enter the month and year the parents were remarried.

32x. Parents' State of Legal Residence:

Enter the US Postal Service abbreviation of the state where the parents presently have their legal residence.

32z. Income from non-U.S. sources in 2007?:

Are you a non-U.S. citizen whose income in 2007 came primarily from non-U.S. sources? (1=Yes, 2=No)

Parent's Annual Income and Expense Figures

All of the instructions in this section cover both the actual (if available) or estimated information for 2007, and the estimated information for 2008. Students/spouses are to fill in both columns of data.

All dollar amounts in this section are to be entered in whole dollars only, and are to cover the one-year period listed at the top of each column. Don't leave any answers blank. If the answer for a question is 'zero', enter the number '0'.

33, 4a. Source of U.S. Tax Figures:

For each year, enter the number from the following list corresponding to the source of the tax figure:

- 1) A completed IRS Form 1040A or 1040EZ
- 2) A completed IRS Form 1040
- 3) An estimated IRS Form 1040A or 1040EZ
- 4) An estimated IRS Form 1040
- 5) A tax return will not be filed
- 6) A completed IRS Form 1040NR (Non Resident)
- 7) An estimated IRS Form 1040NR (Non Resident)

(If the answer is 5, no entry should be made for the following items: Number of Exemptions, Adjusted Gross Income, U.S. Income Tax Paid, and Itemized Deductions.)

33, 4b. Number of Exemptions:

Enter the number of exemptions claimed on U.S. income tax form:

- IRS Form 1040 line 6d, or
- IRS Form 1040A line 6d, or
- IRS Form 1040EZ, (if you checked 'yes' on Form 1040EZ line 5, use the 1040EZ worksheet to determine the number of exemptions. If you checked 'no', enter '01' if you are single or '02' if you are married.

33, 4c. Adjusted Gross Income:

Enter the Adjusted Gross Income amount from:

- IRS Form 1040 line 37, or
- IRS Form 1040A line 21, or
- IRS Form 1040EZ line 4.

33, 4d. Itemized Deductions:

Enter the amount from Form 1040, Schedule A, line 29. If deductions were not itemized or if a Form 1040A or 1040EZ was filed, enter '0'. (Business or farm owners should not use any amounts from Schedules C or F.)

33, 4e. U.S. Income Tax Paid:

Enter the amount of U.S. income tax paid from:

- IRS Form 1040 line 57, or
- IRS Form 1040A line 35, or
- IRS Form 1040EZ line 10.

Do not include any FICA, self-employment, or other taxes. Do not copy the amount of "federal income tax withheld" from a W-2 form.

33, 4f. Father's Earned Income from Work:

Enter the amount of income earned from work by the father (or stepfather). Include wages, salaries, tips, and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted. Do not include any amount from work-study.

33, 4g. Mother's Earned Income from Work:

Enter the amount of income earned from work by the mother (or stepmother). Include wages, salaries, tips, and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted. Do not include any amount from work-study.

33, 4h. Interest Income:

Enter the amount of interest income received from:

- IRS Form 1040 line 8a, or
- IRS Form 1040A line 8a, or
- IRS Form 1040EZ line 2.

33, 4i. Dividend Income:

Enter the amount of dividend income received from:

- IRS Form 1040 line 9a, or
- IRS Form 1040A line 9a.

33, 4j. Other Taxable Income:

Enter the total amount of other taxable income reported on IRS Form 1040 or 1040NR. Include alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation, and social security.

UNTAXED INCOME AND BENEFITS**33, 4k. Earned Income Credit:**

Enter the amount of earned income credit from IRS Form 1040 line 66a, or 1040A line 40a, or 1040EZ line 8a.

33, 4m. Social Security Benefits:

Enter the amount of untaxed social security benefits (including Supplemental Security Income). Do not include any benefits included under "Adjusted Gross Income" above. Write in the total for the year, not the monthly amounts. Include any amounts for children.

33, 4n. Aid to Families with Dependent Children:

Enter the amount of benefits received in 2007 from Aid to Families with Dependent Children or Temporary Assistance for Needy Families. (These are usually referred to as AFDC, ADC or TANF benefits.)

33, 4o. Child Support Received:

Enter the amount of child support received for all children.

33, 4p. Other Untaxed Income/Benefits:

Enter the total amount of untaxed income and benefits. Include the following items:

- Deductible IRA and/or Keogh payments from IRS Form 1040, total of lines 28 and 32, or 1040A line 17.
- Untaxed portions of pensions from:
 - IRS Form 1040 lines 15a minus 15b and 16a minus 16b, or
 - IRS Form 1040A lines 11a minus 11b and 12a minus 12b.
- Credit for federal tax on special fuels from IRS form 4136.
- Housing, food and other living allowances (excluding rent subsidies for low-income housing) paid to members of the military, clergy and others, including cash payments and cash value of benefits.
- Credits to tax-deferred pension and savings plans (paid directly or withheld from earnings). Included untaxed portions of 401(k) and 403(b). (Check your W-2.)
- Veterans non-educational benefits, such as Death Pension, Dependency & Indemnity Compensation (DIC), etc.
- Foreign income exclusion from IRS Form 2555.
- Tax exempt interest income from IRS Form 1040 line 8b or 1040A line 8b.

- Welfare benefits (except AFDC/ADC/TANF).
- Workers Compensation.
- Cash support or other money paid on the student's behalf, not reported elsewhere in this application.
- Any other untaxed income and benefits, such as Black Lung Benefits, Refugee Assistance, untaxed portions of Railroad Retirement Benefits, or Job Training Partnership Act non-educational benefits.
- Additional child tax credit from IRS Form 1040 Line 68 or 1040A line 41.

Do not include any of the following items:

- Social Security Benefits.
- Aid to Families with Dependent Children (AFDC/ADC/TANF).
- Child support received.
- Any income reported elsewhere in this application.
- Money from student financial aid.
- Veterans educational benefits (VA Vocational Rehabilitation Program, VEAP benefits, Dependent Educational Assistance Program Benefits, GI Bill, etc.)
- Food Stamps.
- Rollover pensions.
- Payments received from states for foster care and adoption assistance under Title IV-A or IV-E of the Social Security Act.
- Gifts and support, other than money, received from friends and relatives.

33, 4q. Medical/Dental Expenses:

Enter the total amount for medical and dental expenses (including insurance premiums). Do not include amounts covered by insurance, your company medical reimbursement account (flexible spending account), or self-employed health deductions from IRS form 1040. If deductions are itemized on the U.S. income tax return, enter the amount from IRS form 1040, Schedule A, line 1.

33, 4r. Elementary/Junior High/High School Tuition:

Enter the total amount of tuition paid for elementary, junior high, and high school tuition for all children. (Tuition does not include room, board, books, transportation, etc.) Do not include any tuition paid for preschool or college. Do not include tuition paid for by scholarships. Do not include any tuition paid for the applicant.

33, 4s. Number of Children Tuition Paid for:

Enter the number of dependent children for whom the above tuition is paid.

INCOME EXCLUSIONS**33, 4t. Child Support Paid by You:**

Enter the amount of child support paid by each parent in 2007 and the expected amount for 2008.

33, 4u. Education credits received:

Enter the amount of education credits (Hope and Learning Lifetime Tax Credits) each parent received in 2007, and the expected amount for 2008, from IRS form 1040 line 49, or IRS form 1040A line 31.

33, 4v. Financial Aid Reported as Income:

Enter the amount of Educational Financial Aid received by each parent in 2007, and expected to be received in 2008, only if it was included above in any of the entries for taxable income, such as Adjusted Gross Income, Earned Income, or Other Taxable Income. (May include earnings from work-study or other need-based work programs, and grant and scholarship aid in excess of tuition, fees, books, and required supplies.)

Parent's Assets**36a. Cash, Savings and Checking Accounts:**

Enter the amount of money in cash, savings and checking accounts as of today.

36b. Home Value:

Enter the current value of the home. Use the price that would be placed on the home if it went on sale today. Do not use assessed, insured or tax value. A "home" includes a house, mobile home, condominium, etc. Renters, enter '0'.

36c. Home Debt:

Enter the amount currently owed on the home, including the present mortgage and related debts on the home. Do not include interest due on the mortgage. Check with the mortgage company if unsure of the amount owed.

36d. Year Home Purchased:

If the parents own a home, enter the original purchase price of the home.

36e. Home Purchase Price:

If the parents own a home, enter the original purchase price of the home.

36f. Other Real Estate Value:

Enter the current value of other real estate (including rental property, land, second or summer homes, etc.)

36g. Other Real Estate Debt:

Enter the amount currently owed on other real estate.

36h. Investment Value:

Enter the current Value of parents' investments, including trust funds, certificates of deposit, money market funds, mutual funds, stocks, bonds, other securities, installment and land sale contracts (including mortgages held) commodities, precious metals, etc. Do not include any amount of these investments held in retirement plans, such as pension funds, annuities, IRA's, Keogh accounts, etc.

36i. Investment Debt:

Enter any amount owed on these investments. Do not include any personal or consumer loans, or any debts that are not related to the assets included here. Do not include any educational loans.

36j. Business Value:

If you own a business, enter the current value of the business. Include the value of land, buildings, machinery, inventory and equipment. If you are not the sole owner, enter only your share of the business value.

36k. Business Debt:

Enter the amount currently owed on the business. Include only the present mortgage and related debts for which the business is being used as collateral. If you are not the sole owner, enter only your share of the business debt.

36ka. Small family-run business?

Is the business which is listed here operated by your family, AND does it have fewer than 100 employees? (1=Yes, 2=No)

36m. Farm Value:

If you own a farm, enter the current value of the farm. Include the value of buildings, machinery, equipment, livestock, inventories, etc. Do not include the value of the home in this question. (Give home value above.) If you are not the sole owner, enter only your share of the farm value.

36n. Farm Debt:

Enter the amount currently owed on the farm. Include only the present mortgage and related debts for which the farm is being used as collateral. If are not the sole owner, enter only your share of the farm debt.

36o. Family Lives on Farm:

Enter the number corresponding to the answer to the question: Is your family living on the farm? (1=Yes, 2=No)

36p. Retirement Accounts Value:

Enter the current value of parents' retirement accounts, including IRA, Keogh and Roth accounts, and employer based tax-deferred pension and savings plans such as 401(k), 403(b) and 457 plans.

Parent's Household Expenses:

39a. Monthly Rent/Mortgage Amount:

Enter the amount of the parents' current monthly rent or mortgage payment.

39b. Local Income and Property Taxes:

Enter the total amount of local income and property taxes paid during 2007.

39c. Parents Own or Lease a Vehicle:

Enter the number corresponding to the answer to the following questions: Do(es) the student (and spouse) own or lease a vehicle? (1=Own, 2=Lease, 3=Own/Lease, 4=None)

39d-i. Year/Make/Model:

Enter the vehicle year, make and model for up to two vehicles. If more than two vehicles are owned/leased, list the more expensive ones.

39j. Total Vehicle Indebtedness as of 12/31/07:

Enter the total vehicle indebtedness as of December 31, 2007.

39k. Total Monthly Vehicle Payments:

Enter the current total of monthly vehicle payments due on loans made for the purchase of the vehicle(s).

Parent's Household Information:

This section asks questions about members of the parents' household. Information on up to eight household members can be listed here, each in one of the columns provided (two sections of four columns each).

A member of the parents' household is a person that the parents will support between July 1, 2008 and June 30, 2009. Children of student's parents, other than the student, should be included only if they get more than half of their support from the parents. Include the parent (s) in the columns provided. DO NOT INCLUDE THE STUDENT APPLICANT HERE.

Support includes money, gifts, loans, housing, food, clothes, car, medical and dental care, payment of college costs, etc.

Other people should be included only if they meet the following criteria:

- They live with the parents now, AND
- They get more than half their support from the parents, AND
- They will continue to get this support between 7/1/07 and 6/30/08.

41-48a. Name:

Enter the name of the parents' household member.

41-48b. Age:

Enter the age of the parents' household member as of today.

41-48c. Relationship:

From the table listed here, enter the number of the entry which best describes the household member's relationship to the student.

- | | |
|--------------------------------|---------------------------|
| 1) Student's parent/stepparent | 4) Student's son/daughter |
| 2) Student's brother/sister | 5) Student's grandparent |
| 3) Student's spouse | 6) Other |

41-48d. College Student (in 2008-2009)

Enter the number corresponding to the answer to following questions: Will the household member by going to college at least halftime during the 2008-2009 academic year? (1=Yes, 2=No)

A "yes" response indicates that the member will be going to college, graduate/professional school, or other school beyond the high school level between July 1, 2008 and June 30, 2009, and will be enrolled at least half-time at least one term.

A "yes" response also indicates that the member is working toward a degree or certificate leading to a recognized education credential at college that is eligible to participate in any of the federal student aid programs.

41-48e. Institution Name (in 2008-2009):

Enter the name of the educational institution the household member will attend in 2008-2009. Leave this item blank if uncertain about the institution to be attended.

41-48f. Class in School (in 2008-2009):

List the grade or class of the household member for the 2008-2009 academic year.

- Undergraduate examples: Freshman, Sophomore, Junior, Senior, 5th year
- Graduate examples: 1st yr grad, 2nd yr grad, 3rd yr grad, 4th yr grad, 5th yr grad

41-48g. Aid from Parents (in 2008-2009):

Enter the amount of educational financial assistance to be received by the household member from parents in 2008-2009.

41-48h. Institution Name (in 2007-2008):

Enter the name of the educational institution the household member attended (is attending) in 2007-2008.

41-48m. Aid from Parents Last Year:

Enter the amount of any educational financial assistance received by the household member from the parents for the most recent year that the household member attended college. Please respond to this item even if several years have passed since the household member attended college.

Parent's Special Circumstances

59. Special Circumstances:

Enter here any explanations of special circumstances that you believe may affect the financial aid decision for this applicant.

2008 – 2009 Parent Information Worksheet

This worksheet is for parents who prefer to prepare their financial data on paper before entering the information in the Need Access Application at www.needaccess.org. Do not send your 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 DIVORCED/SEPARATED PARENT form.

Be sure to print the **Parent Information Worksheet Instructions** that accompany this worksheet.

Student Name: _____ Student SSN: _____

Parent's General Information

	(31) Father	(32) Mother
a. Parent in household (Yes, No):	_____	_____
Deceased (Yes, No):	_____	_____
b. Relationship to student: (Father/Mother, Stepparent, Guardian, None, Other)	_____	_____
c. Name:	_____	_____
Date of birth:	_____	_____
d. Street:	_____	_____
City/State/Zip	_____ / ____ / _____	_____ / ____ / _____
h. Country:	_____	_____
i. Occupation:	_____	_____
j. Job title:	_____	_____
k-m. Employer:	_____	_____
Years:	_____	_____
32p. Phone number	_____	_____
32qp. Name of parent who last claimed student as tax dependent:	_____	
32qy. Last year claimed:	_____	
32r. Release of financial data to student? (Yes, No):	_____	

Parent's Household Information

32s. Number of family members (including student): _____	32t. Number in college: _____
32v. Parent's current marital status: _____ (Single, Married, Separated, Divorced, 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: _____	
32z. Income from non-U.S. sources in 2007 (Yes, No): _____	

Parent's Annual Income and Expense Figures

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

	2007	2008 (projected)
33, 34a. Source of following U.S. tax figures:		
Completed 1040A or 1040EZ	Estimated 1040A or 1040EZ	Estimated 1040NR
Completed 1040	Estimated 1040	Completed 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 from work:	\$ _____	\$ _____
33, 34g. Mother's earned income from work:	\$ _____	\$ _____
33, 34h. Interest income:	\$ _____	\$ _____
33, 34i. Dividend income:	\$ _____	\$ _____
33, 34j. Other taxable income:	\$ _____	\$ _____
Untaxed income and benefits		
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 expenses:	\$ _____	\$ _____
33, 34r. Elementary/junior high/high school tuition:	\$ _____	\$ _____
33, 34s. Number of children paid for:	_____	_____
Income exclusions		
33, 34t. Child support paid by you:	\$ _____	\$ _____
33, 34u. Education credit received:	\$ _____	\$ _____
33, 34v. Financial aid reported as income:	\$ _____	\$ _____

Parent's Assets

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

	Value	Debt
36a. Cash, savings, and checking accounts:	\$ _____	
36b-c. Home:	\$ _____	\$ _____
36d. If home is owned, year purchased:	_____	
36e. Home purchase price:	\$ _____	
36f-g. Other real estate:	\$ _____	\$ _____
36h-i. Investments:	\$ _____	\$ _____
36j-k. Business:	\$ _____	\$ _____
36ka. Small family-run business (Yes, No):	_____	_____
36m-n. Farm:	\$ _____	\$ _____
36o. Family lives on farm (Yes, 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 (own, lease, own/lease, none): _____
- 39d-f. Year: _____ Make: _____ Model: _____
- 39g-i. Year: _____ Make: _____ Model: _____
- 39j. Total vehicle indebtedness as of December 31, 2007: \$ _____
- 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: | _____ | _____ | _____ | _____ |
| Student's parent | Student's spouse | Student's grandparent | | |
| Student's brother/sister | Student's son/daughter | Other | | |

2008-2009 Academic Year

- d. College student (Yes, No): _____
- e. Institution name: _____
- f. Class in school: _____
- g. Aid from parents: \$ _____ \$ _____
- n. Tuition and fees \$ _____ \$ _____

2007-2008 Academic Year

- h. Institution name: _____
- m. Aid from parents last year: \$ _____ \$ _____

- | | (45)
Other 3 | (46)
Other 4 | (47)
Other 5 | (48)
Other 6 |
|--------------------------|------------------------|-----------------------|-----------------|-----------------|
| a. Name: | _____ | _____ | _____ | _____ |
| b. Age: | _____ | _____ | _____ | _____ |
| c. Relationship: | _____ | _____ | _____ | _____ |
| Student's parent | Student's spouse | Student's grandparent | | |
| Student's brother/sister | Student's son/daughter | Other | | |

2008-2009 Academic Year

- d. College student (Yes, No): _____
- e. Institution name: _____
- f. Class in school: _____
- g. Aid from parents: \$ _____ \$ _____ \$ _____ \$ _____

2007-2008 Academic Year

- h. Institution name: _____
- m. Aid from parents last year: \$ _____ \$ _____ \$ _____ \$ _____

Parent's Special Circumstances

59. Please describe your special circumstances below. _____

