

27. What is the name of the high school where you received or will receive your high school diploma? Enter the complete high school name, and the city and state where the high school is located.

High School Name

High School City

STATE

28. Will you have your first bachelor's degree before you begin the 2021-2022 school year?

Yes ☐ 1 No ☐ 2

29. What will your college grade level be when you begin the 2021-2022 school year?

- Never attended college and 1st year undergraduate ☐ 0
- Attended college before and 1st year undergraduate ☐ 1
- 2nd year undergraduate/sophomore ☐ 2
- 3rd year undergraduate/junior ☐ 3
- 4th year undergraduate/senior ☐ 4
- 5th year/other undergraduate ☐ 5
- 1st year college graduate/professional (MBA, MD, PhD, etc.) ☐ 6
- Continuing graduate/professional or beyond (MBA, MD, PhD, etc.) .. ☐ 7

30. What college degree or certificate will you be working on when you begin the 2021-2022 school year?

- 1st bachelor's degree ☐ 1
- 2nd bachelor's degree ☐ 2
- Associate degree (occupational or technical program) ☐ 3
- Associate degree (general education or transfer program) ☐ 4
- Certificate or diploma (occupational, technical or education program of less than two years) ☐ 5
- Certificate or diploma (occupational, technical or education program of two or more years) ☐ 6
- Teaching credential (nondegree program) ☐ 7
- College graduate or professional degree (MBA, MD, PhD, etc.) ☐ 8
- Other/undecided ☐ 9

31. Are you interested in being considered for work-study?

Yes ☐ 1 No ☐ 2 Don't know ☐ 3

Step Two (Student):

Answer questions 32–57 about yourself (the student). If you were never married, or are separated, divorced or widowed and are not remarried, answer only about yourself. If you are married or remarried as of today, include information about your spouse.

32. For 2019, have you (the student) completed your IRS income tax return or another tax return listed in question 33?

- I have already completed my return ☐ 1
- I will file but have not yet completed my return ☐ 2
- I'm not going to file. **Skip to question 38.** ☐ 3

33. What income tax return did you file or will you file for 2019?

- IRS 1040 ☐ 1
- A foreign tax return, IRS 1040NR or IRS 1040NR-EZ. **See Notes page 9.** ☐ 3
- A tax return with Puerto Rico, another U.S. territory, or Freely Associated State. **See Notes page 9.** ☐ 4

34. For 2019, what is or will be your tax filing status according to your tax return?

- Single ☐ 1
- Head of household ☐ 4
- Married—filed joint return ☐ 2
- Married—filed separate return ☐ 3
- Qualifying widow(er) ☐ 5
- Don't know ☐ 6

35. Did (or will) you file a Schedule 1 with your 2019 tax return? Answer **"No"** if you did not file a Schedule 1 or **only filed** a Schedule 1 to report: unemployment compensation, educator expenses, IRA deduction, student loan interest deduction, Alaska Permanent Fund dividend, or virtual currency. **See Notes page 9.**

Yes ☐ 2 No ☐ 1 Don't know ☐ 3

For questions 36–44, if the answer is zero or the question does not apply to you, enter 0. Report whole dollar amounts with no cents.

36. What was your (and spouse's) adjusted gross income for 2019? Adjusted gross income is on IRS Form 1040—line 8b.

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37. Enter your (and spouse's) income tax for 2019. Income tax amount is the total of IRS Form 1040—line 14 minus Schedule 2—line 2. If negative, enter a zero here.

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Questions 38 and 39 ask about earnings (wages, salaries, tips, etc.) in 2019. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms or on the tax return selected in question 33: IRS Form 1040—line 1 + Schedule 1—lines 3 + 6 + Schedule K-1 (IRS Form 1065)—Box 14 (Code A). If any individual earning item is negative, do not include that item in your calculation.

38. How much did you earn from working in 2019?

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39. How much did your spouse earn from working in 2019?

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40. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? **Don't include** student financial aid.

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41. As of today, what is the net worth of your (and spouse's) investments, including real estate? **Don't include** the home you live in. **See Notes page 9.**

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42. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? **Don't include** a family farm or family business with 100 or fewer full-time or full-time equivalent employees. **See Notes page 9.**

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43. Student's 2019 Additional Financial Information (Enter the combined amounts for you and your spouse.)

- a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.
- b. Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your household, as reported in question 93.
- c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
- d. Taxable college grant and scholarship aid **reported to the IRS as income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
- e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. **Don't include** untaxed combat pay.
- f. Earnings from work under a cooperative education program offered by a college.

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44. Student's 2019 Untaxed Income (Enter the combined amounts for you and your spouse.)

- a. Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S. **Don't include** amounts reported in code DD (employer contributions toward employee health benefits).
- b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 15 + 19.
- c. Child support received for any of your children. **Don't include** foster care or adoption payments.
- d. Tax exempt interest income from IRS Form 1040—line 2a.
- e. Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 4c) minus (lines 4b + 4d). **Exclude rollovers.** If negative, enter a zero here.
- f. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.
- g. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- h. Other untaxed income not reported in items 44a through 44g, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 12. **Don't include** extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
- i. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

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See Notes page 9.**Step Three (Student):** Answer the questions in this step to determine if you will need to provide parental information. Once you answer **"Yes" to any** of the questions in this step, skip Step Four and go to Step Five on page 8.

45. Were you born before January 1, 1998?
46. As of today, are you married? (Also answer "Yes" if you are separated but not divorced.)
47. At the beginning of the 2021-2022 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?
48. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training? **See Notes page 9.**
49. Are you a veteran of the U.S. Armed Forces? **See Notes page 9.**
50. Do you now have or will you have children who will receive more than half of their support from you between July 1, 2021 and June 30, 2022?
51. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2022?
52. At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? **See Notes page 10.**
53. As determined by a court in your state of legal residence, are you or were you an emancipated minor? **See Notes page 10.** ..
54. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence? **See Notes page 10.**
55. At any time on or after July 1, 2020, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.**
56. At any time on or after July 1, 2020, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.**
57. At any time on or after July 1, 2020, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? **See Notes page 10.**

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