

2009 – 2010 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 2008 (Yes, No): _____	

Parent's Annual Income and Expense Figures

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

	2008	2009 (projected)
33, 34a. Source of following U.S. tax figures:		
Completed 1040A or 1040EZ	Estimated 1040A or 1040EZ	Estimated 1040NR
Completed 1040	Estimated 1040	Estimated 1040NR
	Tax return will not be filed	Estimated 1040NR
	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, 2008: \$ _____
- 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 | | |

2009-2010 Academic Year

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

2008-2009 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 | | |

2009-2010 Academic Year

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

2008-2009 Academic Year

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

Parent's Special Circumstances

59. Please describe your special circumstances below. _____

