



Parents' Income and Expense Information

8 Basic tax information:

- 8A** The information on this form is from a 2008 tax return that is: Completed Estimated
- 8B** Income tax filing status for: (2008) 1. Single 2. Married, joint return 3. Married, filing separately 4. Head of household 5. Do not file (2009) 1. Single 2. Married, joint return 3. Married, filing separately 4. Head of household 5. Do not file
- 8C** Did the student applicant(s) file a federal tax return for 2008?
 Student A Yes No Student B Yes No Student C Yes No
- 8D** How many federal income tax exemptions did you or will you claim for 2008?
- 8E** How many children, including the student applicant(s), are receiving support from you in 2009?
- 8F** How many children entered in question 8E will be attending full-time child care, tuition-charging preschools, schools, or colleges in 2009–2010?

9 Total taxable income before deductions:

	2008	Estimated 2009
9A Salaries and wages for parent, stepparent, or guardian in 6A.....	\$	\$
9B Salaries and wages for parent, stepparent, or guardian in 6B.....	\$	\$
9C Taxable dividends and/or interest income from 1099 statement(s).....	\$	\$
9D Alimony received or estimated (<i>do not include child support</i>).....	\$	\$
9E Net profit/loss from business and/or farm (<i>if loss use parentheses around figures</i>).....	\$	\$
Check only one box. <input type="checkbox"/> 1. parent, stepparent, or guardian in 6A <input type="checkbox"/> 2. parent, stepparent, or guardian in 6B <input type="checkbox"/> 3. both		
9F Other taxable income.....	\$	\$
10A Untaxed portion of payments to IRA.....	\$	\$
10B Keogh plan payments and self-employed SEP deduction.....	\$	\$
11 Other IRS allowable adjustments to taxable income.....	\$	\$
12 Total nontaxable income:		
12A Child support received for all children.....	\$	\$
12B Social security benefits for entire family.....	\$	\$
12C Other nontaxable income (<i>complete the worksheet on page 4 of the PFS and enter totals here</i>).....	\$	\$
13 IRS total itemized deductions from IRS schedule A.....	\$	\$
14 Total federal tax paid (2008 IRS 1040 or 1040A).....	\$	\$
15 Self-employment tax paid.....	\$	\$
16 Insurance and medical/dental expenses:		
16A Total medical/dental expenses not reimbursed by insurance companies.....	\$	\$
16B Total paid for medical/dental insurance plans.....	\$	\$
17 Unusual expenses (<i>see lists of acceptable and nonacceptable expenses in the instructions</i>).....	\$	\$



Family Assets and Debts

18A Home (*if owned*) Year purchased _____ Total property insurance carried _____ Present market value _____ Unpaid principal on 1st mortgage _____ Annual payments on 1st mortgage _____
 Purchase price \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

18B Do you have a second mortgage or equity loan on the home listed in 18A? Yes No
If so describe the purpose of loan in area 32.
 Year of 2nd mortgage _____ Year of equity loan _____ + \$ _____ \$ _____

18C Enter the total amount of unpaid principal and annual payments on all mortgages and equity loans on your home.
 Unpaid principal on all mortgages and equity loan(s) on your home _____ Annual payments on all mortgages and equity loan(s) on your home _____
 = \$ _____ \$ _____

19 All other real estate (*see instructions*). Year purchased _____ Total property insurance carried _____ Present market value _____ Unpaid principal on all other Real Estate _____ Annual payments on all other Real Estate _____
 Purchase price \$ _____ \$ _____ \$ _____ \$ _____ \$ _____

20 Bank accounts—total of parents' checking and savings (*interest-bearing and noninterest bearing*) accounts. \$ _____

21 Investments—net value (*stocks, bonds, mutual funds, etc.—see instructions*). Do not include value of pensions, retirement plans, IRA's, SEP's, or Keoghs. \$ _____

22A Debts (*see list of acceptable debts in the instructions*). \$ _____

22B Amount in 22A planned to be paid during 2009. \$ _____

22C Consumer debts (*see instructions*). \$ _____

23 Complete item 23 only if you own a business and/or farm (*see instructions*). Be sure to complete the SSS Business/Farm Statement if the schools to which you are applying require it.
 A. % of ownership B. Assets C. Debts
 % \$ \$

24 Student assets (*see instructions*). Enter information only for student applicant(s) listed in Section A.
 Student A Student B Student C
 \$ \$ \$

E

Family Expenses and Additional Information

	Student A	Student B	Student C
25A How much can you afford for educational expenses for the 2009–2010 academic year for each student applicant? Do not leave blank.	\$ _____	\$ _____	\$ _____
25B How much can you afford for educational expenses for the 2009–2010 academic year for all students listed in item 27? Do not leave blank.	All students total	\$ _____	

For items 26 and 27, please provide information below **for all children**. Enter first and last names. The number of children should be the same as entered in item 8E. List student applicants first, in the same order as in Part I A, B, and C. List all children, those applying for aid and those not applying for aid. *Continue in area 32 if necessary.*

26 Current Year (2008–2009)

A. Full name	B. Name of present child care, preschool, school, or college (2008–2009)	C. Grade or year in school or college	D. Age	E. Cost of child care, preschool, school, or college	Amount of this cost paid by (F–J):				
				F. Parent or guardian	G. Financial aid grant	H. Loan	I. Students' assets & earnings	J. Friends, relatives, trust funds, & other sources <i>explain in 32</i>	
1. _____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	
2. _____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	
3. _____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	
4. _____	_____	_____	_____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	

27 Next Year (2009–2010)

A. Full name	B. Name of child care, preschool, school, or college to be attended in (2009–2010)	C. Grade or year in school or college	D. <input type="checkbox"/> Living w/ person filing <input type="checkbox"/> Child care <input type="checkbox"/> Public school <input type="checkbox"/> Private school <input type="checkbox"/> College <input type="checkbox"/> Applied for aid	E. Check appropriate boxes for 2008–2009	Dollar amounts that will be available to cover school costs for academic year 2008–2009			
				F. From parents' income & assets	G. From child support or social security	H. From students' assets & earnings	I. From friends, relatives, trust funds, & other sources <i>explain in 32</i>	
1. _____	_____	_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____	\$ _____	
2. _____	_____	_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____	\$ _____	
3. _____	_____	_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____	\$ _____	
4. _____	_____	_____	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	\$ _____	\$ _____	\$ _____	\$ _____	

- | | 2008 | Estimated 2009 |
|--|---|--|
| 28 If you do not own your home and rent your family residence, provide total amount of annual rent you paid for 2008 and what you estimate for 2009 | \$ _____ | \$ _____ |
| 29A Is there an employee retirement plan for parent, stepparent, or guardian in 6A? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| Is there an employee retirement plan for parent, stepparent, or guardian in 6B? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| 29B Total employment-related child care expenses in 2008 | \$ _____ | |
| 29C Face value of parents' life insurance policies: | \$ _____ | |
| <input type="checkbox"/> Term life <input type="checkbox"/> Whole life <input type="checkbox"/> Universal life <input type="checkbox"/> Single-premium life | | |
| 29D Annual cost of clubs requiring dues over \$250 in 2008 | \$ _____ | |
| 29E Costs of camps and lessons in 2008 | \$ _____ | |
| 29F Costs of vacations in 2008 | \$ _____ | |
| 29G Indicate student applicant(s) earnings for calendar year. | Student A. \$ _____ | \$ _____ |
| | Student B. \$ _____ | \$ _____ |
| | Student C. \$ _____ | \$ _____ |
| 30A List all family cars (if more than three cars are owned or leased, list additional cars in area 32). | | |
| 1. (make and year) _____ | <input type="checkbox"/> Own <input type="checkbox"/> Lease | <input type="checkbox"/> Provided by employer/business |
| 2. (make and year) _____ | <input type="checkbox"/> Own <input type="checkbox"/> Lease | <input type="checkbox"/> Provided by employer/business |
| 3. (make and year) _____ | <input type="checkbox"/> Own <input type="checkbox"/> Lease | <input type="checkbox"/> Provided by employer/business |
| Current total car debt \$ _____ | Annual lease expense \$ _____ | |
| 30B List all boats and other recreational vehicles owned or leased (if more than one vehicle is owned or leased, list additional vehicles in area 32). (make and year) | | |
| 31 Complete this item only if student applicants' parents are separated, divorced, or have never been married. | | |
| <input type="checkbox"/> Divorced <input type="checkbox"/> Separated, no court action <input type="checkbox"/> Legally separated <input type="checkbox"/> Never married | | |
| Year of divorce or separation _____ Is there a joint custody agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |

Other parent's full name _____

Home address _____ Telephone _____

Occupation _____ Employed by _____

