

Resource Evaluation Question Guide

Non-FAFSA Parent Form

QUESTION	INSTRUCTIONS
PARENT INFORMATION SECTION	
What is your relationship to the student?	<p>Report the parent's relationship to the student</p> <ul style="list-style-type: none"> • Biological Father if the parent completing this form is the student's biological father • Biological Mother if the parent completing this form is the student's biological mother • Adoptive Father if the parent completing this form is the student's adoptive father • Adoptive Mother if the parent completing this form is the student's adoptive mother
Your Date of Birth	The Date of Birth entered by the parent when logging into this form is pre-populated and cannot be changed
Do you (or your spouse, if married) own all or part of a business/farm?	<ul style="list-style-type: none"> • YES if the parent and/or spouse owns all or part of a business/farm • NO if the parent and/or spouse does not own all or part of a business/farm
What is your current marital status?	<p>Report the parent's marital status, as of today</p> <ul style="list-style-type: none"> • MARRIED if parent is currently married/remarried to someone other than the student's other biological/adoptive parent • SEPARATED if parent is currently married but is considered legally separated or the couple chooses to live separate lives (separate households as though not married) • DIVORCED if parent is legally divorced • WIDOWED if parent's spouse is deceased and the parent is not re-married • SINGLE if the parent is currently not married/re-married and divorced or widowed status does not apply
Are you (or your spouse, if married) a Dislocated Worker?	<ul style="list-style-type: none"> • YES if parent and/or spouse: <ul style="list-style-type: none"> ○ is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation; ○ has been laid off or received a lay-off notice from a job; ○ was self-employed but is now unemployed due to economic conditions or natural disaster; ○ is the spouse of an active duty member of the Armed Forces and has experienced a loss of employment because of relocating due to permanent change in duty station; ○ is the spouse of an active duty member of the Armed Forces and is unemployed or underemployed, and is experiencing difficulty in obtaining or upgrading employment; or ○ is a displaced homemaker. A displaced homemaker is generally a person who

	<p>previously provided unpaid services to the family (for example: a stay-at-home mom or dad), is no longer supported by the spouse, is unemployed or underemployed, and is having trouble finding or upgrading employment.</p> <p><i>***Except for the spouse of an active duty member of the Armed Forces, if a person quits work, generally he or she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.</i></p> <ul style="list-style-type: none"> • NO if parent and/or spouse does not meet any of the general criteria listed above.
SPOUSE INFORMATION	
ONLY COMPLETE THIS SECTION IF THE PARENT'S REPORTED MARITAL STATUS IS MARRIED	
Spouse's Name	Report the parent's spouse's full name
Do they own all or part of a business/farm?	<ul style="list-style-type: none"> • YES if the parent's spouse owns all or part of a business/farm • NO if the parent's spouse does not own all or part of a business/farm
HOUSEHOLD INFORMATION	
Enter the number of people in your household.	<p>Include:</p> <ul style="list-style-type: none"> • Yourself • Your spouse (if married) • Your children (even if they do not live with you) if you will provide more than half of their support between July 1, 2022 and June 30, 2023 • Other people if they currently live with you and you provide more than half of their support and will continue to do so between July 1, 2022 and June 30, 2023. <p>Do NOT include:</p> <ul style="list-style-type: none"> • The student
Enter the number of people in your household who will be in college.	<p>This should only include people who were included in the parent's household (as indicated above) and who will be in college between July 1, 2022 and June 30, 2023, enrolled at least half-time in a program that leads to a college degree or certificate.</p> <p>Do not include:</p> <ul style="list-style-type: none"> • Yourself or your spouse, or children who are in U.S. military service academies.

INCOME INFORMATION

IMPORTANT: If parent worked and earned income in a foreign country, the parent should convert the foreign dollar amount to U.S. dollars and only report the converted, U.S. dollar amount in this form.

<p>Have you completed (or will you complete) a federal IRS 1040 income tax return for 2020?</p>	<ul style="list-style-type: none"> • YES if parent has already completed (or will complete) 2020 income tax returns • NO if parent was not required to complete 2020 income tax returns and will not file
<p>Your income earned from work</p>	<p>Report the parent’s total wages, salaries, tips, etc.</p> <p><i>On the 2020 federal IRS 1040 form, this information may be found on line 1, Schedule 1 - lines 3 and 6, Schedule K-1 (IRS Form 1065) - box 14 (code A).</i></p> <p>Questions about amounts or what items need to be included should be directed to a tax specialist. Or, refer to your 2020 federal IRS 1040 tax return, W-2 form(s) or other earnings statements.</p>
<p>Your spouse’s income earned from work</p>	<p>Report the parent’s spouse’s total wages, salaries, tips, etc.</p> <p><i>On the 2020 federal IRS 1040 form, this information may be found on line 1, Schedule 1 - lines 3 and 6, Schedule K-1 (IRS Form 1065) - box 14 (code A).</i></p> <p>Questions about amounts or what items need to be included should be directed to a tax specialist. Or, you may refer to the spouse’s 2020 federal IRS 1040 tax return, W-2 form(s) or other earnings statements.</p>
<p>Adjusted Gross Income</p>	<p>The parent should report the total amount of parent’s adjusted gross income (AGI) as reported on the 2020 federal IRS 1040 income tax return.</p> <p><i>On the 2020 federal IRS 1040 form, this information may be found on line 11.</i></p> <p>If the parent is married or unmarried but living with a partner and filed or will file separate tax returns for 2020:</p> <ul style="list-style-type: none"> • Add both AGI’s together <p>If the parent is separated, divorced, widowed or single:</p> <ul style="list-style-type: none"> • Only report the AGI from the parent’s 2020 tax return
<p>Taxes Paid</p>	<p>The parent should report the total income tax paid for 2020.</p> <p><i>On the 2020 federal IRS 1040 form, this information may be found on line 22 minus Schedule 2, line 2 (if applicable).</i></p> <p>If the parent is married or unmarried but living with a partner and filed or will file separate tax returns for 2020:</p> <ul style="list-style-type: none"> • Add both income tax paid amounts together <p>If the parent is separated, divorced, widowed or single:</p> <ul style="list-style-type: none"> • Only report the income tax paid from the parent’s 2020 tax return

<p>Your Untaxed Income for 2020</p>	<p>The parent should report the total amount of any other untaxed income or benefits that the parent received during 2020.</p> <p>Include:</p> <ul style="list-style-type: none"> • 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. Exclude amounts reported in code DD (employer contributions toward employee health benefits). • 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. • Child support received for any children other than the student. • Tax exempt interest income from IRS Form 1040—line 2a. • Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. • Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Exclude the value of on-base military housing or the value of a basic military allowance for housing. • Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. • Other untaxed income not reported above 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. Exclude 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, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
<p>Your Spouse's Untaxed Income for 2020</p>	<p>The parent should report the total amount of any other untaxed income or benefits that their spouse received during 2020.</p> <p>Include:</p> <ul style="list-style-type: none"> • 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. Exclude amounts reported in code DD (employer contributions toward employee health benefits). • 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. • Child support received for any children other than the student. • Tax exempt interest income from IRS Form 1040—line 2a. • Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers. • Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Exclude the value of on-base military housing or the value of a basic military allowance for housing. • Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances. • Other untaxed income not reported above 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. Exclude 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, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
<p>Select all benefits you, or if married, your spouse or anyone in your household received at any time during 2020 or 2021.</p>	<p>The parent should select all benefits the parent OR anyone in the parent's household received during 2020 or 2021.</p>

ASSET INFORMATION	
IMPORTANT: Parent must report all asset information using the U.S. dollar amount, as of TODAY.	
What is the total amount in your cash, savings and checking accounts (as of today)?	<p>The parent(s) should add the account balances of their cash, savings, and checking accounts.</p> <p>Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.</p> <p>Do NOT add student financial aid into the account balances.</p>
What is the total value of your assets held in the names of your and (if married) your spouse's children (other than the student) who are under the age 19 and not college students?	<p>The parent should only report funds that are in custodial accounts, savings or investment accounts if held by the parent in the names of the student's brothers and sisters who are under the age of 19 and not enrolled in college.</p> <p>Do NOT include assets owned by the student's siblings.</p>
What is the net worth of your (and if married, your spouse's) other investments? Net worth means current value minus debt (what is owed).	<p>The parent should report the net worth (Current Market Value subtracted by what is owed) of investments owned by the parent and if married, the parent's spouse.</p> <ul style="list-style-type: none"> Assets owned jointly with someone else (other than custodial parent's spouse): report the portion belonging to the custodial parent(s) only <p>Investments include:</p> <ul style="list-style-type: none"> Trust funds, money market funds, mutual funds, certificates of deposits, stocks, stock options, bonds, other securities Qualified educational benefits or education savings plans such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans <p>Do NOT include:</p> <ul style="list-style-type: none"> The home the custodial parent(s) live in, business(es), farm(s) or other real estate or property Cash, savings and checking account balances Assets held by the custodial parent in the name of the student's sibling(s) The value of life insurance and retirement plans (401(k) plans, pension funds, annuities, non-educational IRA's and Keogh plans
What is the net worth of your (and if married, your spouse's) other real estate investments? Do NOT include the home you live in. Net worth means current value minus debt (what is owed).	<p>The parent should report the net worth (Current Market Value subtracted by what is owed) of all real estate investments as of TODAY.</p> <p>Do NOT include:</p> <ul style="list-style-type: none"> The home the parent(s) live in <p>Include:</p> <ul style="list-style-type: none"> Real estate (including both residential and commercial) Rental property, land, second or summer/vacation homes, time shares

BUSINESS/FARM INFORMATION

IMPORTANT: Parent must report all business/farm asset information using the U.S. dollar amount, as of TODAY.

<p>What is the net worth of your (and your spouse's, if married) business(es)?</p>	<p>The parent should report the net worth (Current Market Value subtracted by what is owed) of all business(es) as of TODAY.</p> <p>Include:</p> <ul style="list-style-type: none">• Land, buildings, machinery, inventory, etc. <p>Do NOT include:</p> <ul style="list-style-type: none">• The value of a small business the parent(s) family owns and controls more than 50% of the business and the business has 100 or fewer full-time employees
<p>What is the net worth of your (and your spouse's, if married) farm(s)?</p>	<p>The parent should report the net worth (Current Market Value subtracted by what is owed) of all farm(s) as of TODAY.</p> <p>Do NOT include:</p> <ul style="list-style-type: none">• The net worth of a family farm that the parent(s) live on and operate