# Resource Evaluation Question Guide

## Custodial Parent Form

<table>
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<th>QUESTION</th>
<th>INSTRUCTIONS</th>
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<tbody>
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<td><strong>PARENT INFORMATION SECTION</strong></td>
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</table>
| What is your relationship to the student? | Report the custodial parent’s relationship to the student  
• 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 |
| Are you self-employed? | • YES if the custodial parent is self-employed  
• NO if the custodial parent is not self-employed |
| Do you own all or part of a business/farm? | • YES if the custodial parent owns all or part of a business/farm  
• NO if the custodial parent does not own all or part of a business/farm |
| What is the marital status of the student’s biological or adoptive parents? | Report the marital status of the student’s natural (biological) or adoptive parents.  
• MARRIED if student’s natural or adoptive parents are married to each other  
• SEPARATED if student’s natural or adoptive parents have separated  
• DIVORCED if student’s natural or adoptive parents are divorced from each other  
• NEVER MARRIED/LIVING SEPARATELY if student’s natural or adoptive parents were never married to each other and are living separately  
• NEVER MARRIED/LIVING TOGETHER if student’s natural or adoptive parents were never married to each other but are living together  
• WIDOWED if one of the student’s natural or adoptive parents are deceased (it does not matter what the parent’s marital status was at the time of the parent’s death)  
• SINGLE ADOPTIVE PARENT (AT TIME OF ADOPTION) if student’s adoptive parent was single at the time of the adoption AND if the student was not later adopted by the parent’s spouse or partner.  
• SINGLE PARENT OF DONOR CONCEIVED CHILD (AT TIME OF CONCEPTION) if student’s natural parent was single at the time of conception AND if the student was not later adopted by the parent’s spouse or partner. |
| **ASSET INFORMATION** | IMPORTANT: Parent must report all asset information using the U.S. dollar amount. |
| What is the total value of your assets held in the names of your and your (if married) current spouse’s children (other than student) who are under the age 19 and not college students? | The custodial 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.  
Do not include assets **owned** by the student’s siblings. |
| 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). | The custodial 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.  
• Assets owned jointly with someone else (other than custodial parent’s spouse): report the portion belonging to the custodial parent(s) only  
Investments include: |
- 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
Do NOT include:
- 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). | The custodial parent should report the net worth (Current Market Value subtracted by what is owed) of all real estate investments as of TODAY? Do NOT include: The home the parent(s) live in Include: Real estate (including both residential and commercial) Rental property, land, second or summer/vacation homes, time shares |}

<table>
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<tr>
<th>BUSINESS/FARM INFORMATION</th>
<th>IMPORTANT: Parent must report all business/farm asset information using the U.S. dollar amount.</th>
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<tr>
<td>What is the net worth of your (and your spouse's, if married) business(es)?</td>
<td>The custodial parent should report the net worth (Current Market Value subtracted by what is owed) of all business(es) as of TODAY. Include: Land, buildings, machinery, inventory, etc. Do NOT include: The net worth 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</td>
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<tr>
<td>What is the net worth of your (and your spouse’s, if married) of your farm(s)</td>
<td>The custodial parent should report the net worth (Current Market Value subtracted by what is owed) of all farm(s) as of TODAY. Do NOT include: The net worth of a family farm that the parent(s) live on and operate</td>
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