

2009-10 Noncustodial PROFILE Pre-Application Worksheet

This worksheet contains all of the questions found on the Noncustodial PROFILE Application. Use it to help collect your family's financial information before you begin your application. You can print instructions from the Help Desk by clicking on "Application Instructions." As you complete your online application, you will find online help.

Do not mail this form to the College Board. It is a Pre-Application Worksheet and cannot be processed. Any worksheets received by the College Board will be destroyed.

Section A - Noncustodial Parent's and Current Spouse's Household Information

1. Information about student's noncustodial parent

a Select relationship to student: Father Mother

b Last name

c First name

d Middle initial

e Address

f City

g State

h Zip

i Country

j Postal Code

k Date of birth (MMDDYYYY)

l Are you: Self-employed? Unemployed?

m If unemployed, enter date unemployment began (MMDDYYYY)

n Occupation

o Employer

p Number of years at current place of employment

q Preferred daytime telephone

r Retirement plans (Check all that apply.)

Social security Civil service/state Military

Union/employer IRA/Keogh/tax-deferred Other

s Total current value of your tax-deferred retirement, pension, annuity, and savings plans. Include IRA, SRA Keogh, SEP, 401(a), 401(k), 403(b), 408, 457, 501(c) plans, etc.

t Will you attend college at least one term during the 2009-2010 school year? (If so, complete questions 1t and 1u.)

Yes No

u College or university name

v College type

2-year public college

2-year private college

4-year public college/university

4-year private college/university

graduate/professional school

proprietary school

2. What is your current marital status? Never married Separated Widowed

Remarried Divorced

3. If you have remarried, enter date of remarriage (MMDDYYYY)

4. If remarried, enter your current spouse's information below (a-o)

a Select relationship to student: Stepfather Stepmother

b Last name

c First name

d Middle initial

e Date of birth (MMDDYYYY)

f Is your spouse: Self-employed? Unemployed ?

g If unemployed, enter date unemployment began (MMDDYYYY)

h Occupation

i Employer

j Number of years at current place of employment

k Retirement plans (Check all that apply.)

Social security Civil service/state Military

Union/employer IRA/Keogh/tax-deferred Other

l Total current value of your tax-deferred retirement, pension, annuity, and savings plans. Include IRA, SRA keogh, SEP, 401(a), 401(k), 403(b), 408, 457, 501(c) plans, etc.

(Section continues on next page.)

m Will your current spouse attend college at least one term during the 2009-2010 school year? (If so, complete questions 4n and 4o.) Yes No

n College or university name

o College type 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

Section A - Noncustodial Parent's and Current Spouse's Household Information (continued)

5. Enter the number of people in your family. Always include yourself, your current spouse (if you have one), the student, and other children who are under age 24 whom you share with the student's custodial parent, even if they do not live with you. Include other people if they currently live with you and receive more than half of their support from you and your current spouse. List the names of your family members and give information about them in Section B (question 9).

6. Of the number in question 5, how many will be college students enrolled at least half-time between July 1, 2009 and June 30, 2010? **Do not include yourself or your spouse.** Include the student.

7. What is your state of legal residence?

8. Preferred email address

Section B - Dependent Family Member Listing

9. Give information for all family members counted in question 5 except yourself and your current spouse. **Failure to complete all information could reduce your child's aid eligibility.**

Student - Family Member 1

2008-2009 school year

Name of school or college

Scholarships and grants \$

Family Member 2

Full name of family member

Relationship to student: Student's brother/sister or half-brother/half-sister Student's grandparent
 Student's stepbrother/stepmother Other (explain in Section I)

Age:

2008-2009 school year

Name of school or college Year in school

Scholarships and grants \$ Parents' contribution \$

2009-2010 school year

Attend college at least one term? Yes, full-time Yes, half-time No, will not attend

College or university name

Type: 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

Family Member 3

Full name of family member

Relationship to student: Student's brother/sister or half-brother/half-sister Student's grandparent
 Student's stepbrother/stepmother Other (explain in Section I)

Age:

2008-2009 school year

Name of school or college Year in school

Scholarships and grants \$ Parents' contribution \$

2009-2010 school year

Attend college at least one term? Yes, full-time Yes, half-time No, will not attend

College or university name

Type: 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

(Section continues on next page.)

Section B - Dependent Family Member Listing (continued)

Family Member 4

Full name of family member

Relationship to student: Student's brother/sister or half-brother/half-sister Student's grandparent
 Student's stepbrother/stepsister Other (explain in Section I)

Age:

2008-2009 school year

Name of school or college Year in school

Scholarships and grants \$ Parents' contribution \$

2009-2010 school year

Attend college at least one term? Yes, full-time Yes, half-time No, will not attend

College or university name

Type: 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

Family Member 5

Full name of family member

Relationship to student: Student's brother/sister or half-brother/half-sister Student's grandparent
 Student's stepbrother/stepsister Other (explain in Section I)

Age:

2008-2009 school year

Name of school or college Year in school

Scholarships and grants \$ Parents' contribution \$

2009-2010 school year

Attend college at least one term? Yes, full-time Yes, half-time No, will not attend

College or university name

Type: 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

Family Member 6

Full name of family member

Relationship to student: Student's brother/sister or half-brother/half-sister Student's grandparent
 Student's stepbrother/stepsister Other (explain in Section I)

Age:

2008-2009 school year

Name of school or college Year in school

Scholarships and grants \$ Parents' contribution \$

2009-2010 school year

Attend college at least one term? Yes, full-time Yes, half-time No, will not attend

College or university name

Type: 2-year public college 2-year private college 4-year public college/university
 4-year private college/university graduate/professional school proprietary school

The number of family members shown in Section B corresponds to the answer given in Question 5 minus parent(s).

Section C - Noncustodial Parent's Support of Former Household

10. Who claimed the student as a dependent on the 2008 US income tax return? Mother Father Neither parent

11. Annual child support you paid or will pay for the student applicant

a 2008 \$

b Expected 2009 \$

12. According to court order, when will (did) the student's child support end? (MMDDYYYY)

13. Annual child support you paid or will pay for all children in the custodial parent's household

a 2008 \$

b Expected 2009 \$

14. Alimony you paid or will pay to the student's custodial parent

a 2008 \$

b Expected 2009 \$

15. a How much did you contribute to the student's education, excluding child support, for the 2008-2009 school year? \$

b How much do you plan to contribute to the student's education, excluding child support, for the 2009-2010 school year? \$

16. Is there an agreement specifying this contribution for the student's education? Yes No

Section D - Noncustodial Parent and Current Spouse's Expenses

17. Child support both you and your current spouse paid or will pay because of divorce or separation

a 2008 \$

b Expected 2009 \$

18. Repayment of your and your current spouse's educational loans

a 2008 \$

b Expected 2009 \$

19. Medical and dental expenses not covered by insurance

a 2008 \$

b Expected 2009 \$

20. Total elementary, junior high, and high school tuition paid for dependent children

Amount paid (Don't include tuition paid for the student.)

a 2008 \$

b Expected 2009 \$

For how many dependent children? (Don't include the student.)

c 2008 \$

d Expected 2009 \$

Section E - Noncustodial Parent's and Current Spouse's 2008 Income & Benefits

21. The following 2008 U.S. income tax return figures are:

- estimated. Will file IRS Form 1040EZ or 1040A. Go to 22.
- estimated. Will file IRS Form 1040. Go to 22.
- from a completed IRS Form 1040EZ or 1040A. Go to 22.
- from a completed IRS Form 1040. Go to 22.
- a tax return will not be filed. Skip to 26.

22. 2008 total number of exemptions (2008 IRS Form 1040, line 6d or 1040A, line 6d; for 1040EZ see instructions)

- 23. **a** 2008 wages, salaries, tips (2008 IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1) \$
- b** 2008 interest income (2008 IRS Form 1040, line 8a or 1040A, line 8a or 1040EZ, line 2) \$
- c** 2008 dividend income (2008 IRS Form 1040, line 9a or 1040A, line 9a) \$
- d** 2008 net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc. (2008 IRS Form 1040, lines 12, 17, and 18) (To enter a loss, use a minus (-) sign.) \$
- e** 2008 other taxable income such as alimony received, capital gains (or losses), pensions, annuities, etc. (2008 IRS Form 1040, lines 10, 11, 13, 14, 15b, 16b, 19, 20b and 21 or 1040A, lines 10, 11b, 12b, 13, and 14b or 1040EZ, line 3) \$
- f** 2008 adjustments to income (2008 IRS Form 1040, line 36 or 1040A, line 20) \$
- g** 2008 adjusted gross income (2008 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4). This entry is the sum of 23a to 23e, minus 23f. \$

- 24. **a** 2008 U.S. income tax paid (2008 IRS Form 1040, line 56 or 1040A, line 35 or 1040EZ, line 10) \$
- b** 2008 education credits - Hope and Lifetime Learning (2008 IRS Form 1040, line 50 or 1040A, line 31) \$

25. 2008 itemized deductions (2008 IRS Schedule A, line 29) \$

26. 2008 income you earned from work \$

27. 2008 income your current spouse earned from work \$

- 28. 2008 untaxed income and benefits (Give total amount for the year. Do not give monthly amounts.)
 - a** Social security benefits received for all family members except the student (untaxed portion only) \$
 - b** Temporary Assistance for Needy Families (TANF) \$
 - c** Child support received for all children \$
 - d** Deductible IRA and/or SEP, SIMPLE, or Keogh payments (2008 IRS Form 1040, lines 28 and 32 or Form 1040A, line 17) \$
 - e** Payments to tax-deferred pension and savings plans \$
 - f** Amounts withheld from wages for dependent care and medical spending accounts \$
 - g** Earned Income Credit (2008 IRS Form 1040, line 64a or 1040A, line 40a or 1040EZ, line 8a) \$
 - h** Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits.) \$
 - i** Tax-exempt interest income (2008 IRS Form 1040, line 8b or 1040A, line 8b) \$
 - j** Foreign income exclusion (2008 IRS Form 2555, line 45 or Form 2555EZ, line 18) \$
 - k** Tuition and fees deduction (2008 IRS Form 1040, line 34 or 1040A, line 19) \$
 - l** Other untaxed income - Write in the total from the worksheet at the end of this document. \$

Section F - Noncustodial Parent and Current Spouse's 2007 Income & Benefits

- 29. 2007 adjusted gross income (2007 IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4) \$
- 30. 2007 U.S. income tax paid (2007 IRS Form 1040, line 57 or 1040A, line 35 or 1040EZ, line 10) \$
- 31. 2007 itemized deductions (2007 IRS Schedule A, line 29.) \$
- 32. 2007 untaxed income and benefits (Include the same types of income and benefits that are listed in 28a-l.) \$

Section G - Noncustodial Parent's and Current Spouse's 2009 Expected Income & Benefits

- 33. 2009 income you will earn from work \$
- 34. 2009 income your current spouse will earn from work \$
- 35. 2009 other taxable income \$
- 36. 2009 untaxed income and benefits (See 28a-l.) \$

Section H - Noncustodial Parent and Current Spouse's Assets

If your current spouse owns more than 50 percent of any asset entered in this section (Section H), give details in Section I, question 46.

- 37. Total cash, savings, and checking accounts (as of today) \$
- 38. Total value of assets held in the names of your and your current spouse's children (other than the student) who are under age 19 and not college students \$
- 39. Investments
 - a What is the total current market value? Write in the total from the worksheet at the end of this document. \$
 - b What is owed on these investments? \$
- 40. Home (Renters fill in "0" in 40a-b and then skip to 40e.)
 - a What is the current market value? \$
 - b What is owed on it? \$
 - c Year purchased (YYYY)
 - d Purchase price \$
 - e Monthly home mortgage or rental payment (If none, explain in Section I.) \$
- 41. Do you or your current spouse own all or part of a business or farm or are either of you self-employed? If you own all or part of a business or farm, enter its name and the percent of ownership in Section I, question 46. If you answer "No," skip to question 44. Yes No
- 42. Business
 - a What is the current market value? \$
 - b What is owed on it? \$
- 43. Farm
 - a What is the current market value? \$
 - b What is owed on it? \$
- 44. Other real estate
 - a What is the total current market value? \$
 - b What is owed on other real estate? \$
 - c Year purchased (YYYY)
 - d Purchase price \$

Section I - Other Important Information

45. Do you authorize the college to discuss the information collected on this form with the student applicant? Yes No

46. Explanations/Special Circumstances - Use this space to explain any unusual expenses such as high medical or dental expenses, educational and other debts, child care, elder care, or special circumstances. When online, please limit your responses to no more than 30 lines of information. If more space is needed, use sheets of paper and send them directly to the student's colleges and programs.

Question 28I

Complete the worksheet below and calculate the total at the end of the questions. Enter the total in question 28I. Don't include any income reported elsewhere on the Noncustodial PROFILE Application; money from student financial aid; Workforce Investment Act educational benefits; veterans educational benefits (GI Bill, Dependent Educational Assistance Program, VA Vocational Rehabilitation Program, VEAP benefits, etc.), non-tax filers' combat pay, or gifts and support, other than money, received from friends and relatives.

Untaxed portions of IRA distributions, excluding "rollovers," from 2008 IRS Form 1040, lines 15a minus 15b or 1040A lines 11a minus 11b	\$
Untaxed portions of pensions, excluding "rollovers," from 2008 IRS Form 1040, lines 16a minus 16b or 1040A lines 12a minus 12b	+
Additional child tax credit from 2008 IRS Form 1040, line 66 or 1040A, line 41	+
Veterans non-educational benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC)	+
Workers' Compensation	+
Cash received or any money paid on your behalf (Don't include child support.)	+
Black Lung Benefits, Refugee Assistance	+
Untaxed portions of Railroad Retirement benefits	+
Any other untaxed income and benefits	+
TOTAL =	
	\$

Question 39a

Complete the worksheet below and calculate the total at the end of the questions. Enter the total in question 39a. Don't include savings entered in question 37 or retirement assets entered in questions 1s and 4I.

Trust funds	\$
Stocks, stock options (if less than \$0, report \$0), bonds, savings bonds, & mutual funds	+
Money market funds	+
Certificates of deposit	+
Coverdell savings accounts	+
Section 529 college savings or pre-paid tuition plans	+
Non-qualified (non-retirement) annuities	+
Commodities	+
Precious & strategic metals	+
Installment & land sale contracts (including seller-financed mortgages)	+
All other investments	+
TOTAL =	
	\$