



2019-2020 (Fall 2019, Spring 2020, Summer 2020)

Name: _____
Student's Name (Last, First, M.I.)

ID: _____
Student Identification Number (SID)

Students who have qualified for in-state tuition at the University of Colorado Boulder under the Colorado ASSET bill may be considered for institutional financial aid. To be eligible, the student must complete this application and provide all of the requested documentation. ASSET students should NOT complete the online FAFSA application to be considered for institutional aid at CU Boulder.

Do not leave any fields blank. Please write '0' or 'NA' if not applicable.

Student Demographics

1. What is your marital status as of today?

I am single

I am married/remarried

Month/Year you were married,
remarried, separated, divorced,
widowed _____ / _____

I am separated

I am divorced or widowed

2. Are you working toward your 1st Bachelor's Degree?

Yes

No

Student (and Spouse) Income

3. For 2017, have you (the student) completed your income tax return?

I have completed my tax return

I'm not going to file (skip to question 8)

4. For 2017, what is or will be your tax filing status according to your tax return?

Single

Head of Household

Married Filing Jointly

Married Filing Separately

Qualifying Widow(er)

5. What was your (and spouse's) adjusted gross income for 2017? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

6. Enter your (and spouse's) income tax for 2017. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10.

7. Enter your (and spouse's) exemptions for 2017. Exemptions are on IRS Form 1040—line 6d or Form 1040A—line 6d. For Form 1040EZ

8. How much did you earn from working in 2017? _____

9. How much did your spouse earn from working in 2017? _____ (write N/A if not applicable)

Student 2017 Additional Financial Information (Enter combined amounts for you and your spouse)

10. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.

11. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.

12. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
13. Taxable college grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
14. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.
15. Earnings from work under a cooperative education program offered by a college.

Student 2017 Untaxed Income (Enter combined amounts for you and your spouse)

16. 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. Don't include amounts reported in code DD (employer contributions toward employee health benefits).

17. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.

18. Child support received for any of your children. Don't include foster care or adoption payments.
19. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.
20. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.
21. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.
22. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.
23. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
24. Other untaxed income not reported above, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include 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, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
25. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

Student and Spouse Asset Information

26. Assets

	Student
Cash, savings and checking (as of today)	\$ _____
Net worth of investments* (as of today)	\$ _____
Net worth of business (as of today)	\$ _____
Net worth of investment farm (do not include farm you live on) (as of today)	\$ _____

* Net worth is value minus debt. Investments include other real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, education IRA's, installment & land sale contracts (including mortgages held), commodities, etc.

Dependency

27. If you qualify for any of the categories below, please select an option. If you do not qualify for any of these categories below, please provide parental information in the following section.

- | | |
|--|--|
| <input type="checkbox"/> Born Before January 1, 1996 | <input type="checkbox"/> Have Dependents Other than Children |
| <input type="checkbox"/> Married | <input type="checkbox"/> Orphan, Ward of Court, Foster Care |
| <input type="checkbox"/> Graduate or Professional | <input type="checkbox"/> At Risk of Homelessness |
| <input type="checkbox"/> Have Children You Support | <input type="checkbox"/> Unaccompanied Youth by HUD/School |

Parent Demographics

Include information for:

- Both biological parents if they are married or are unmarried and living together, otherwise;
- The biological parent with whom you have lived with the most during the last 12 months, otherwise;
- The biological parent that supports you the most, for single parent households;

28. Parent One Name: _____ Date of Birth _____
First, Last MM/DD/YYYY

29. Parent Two Name: _____ Date of Birth _____
First, Last MM/DD/YYYY

30. What is your (parent) marital status as of today?

- | | | |
|--|---|--|
| <input type="checkbox"/> Never been married | <input type="checkbox"/> Married or remarried | Month/Year you were married,
remarried, separated, divorced,
widowed _____/_____ |
| <input type="checkbox"/> Unmarried and both legal
parents living together | <input type="checkbox"/> Separated | |
| <input type="checkbox"/> Divorced or widowed | | |
| | | |

CU Boulder offers some types of aid based on the level of schooling your parents completed.

31. What is the highest level of school completed by Parent 1?

- Middle school/Jr. high High School College or beyond Other/unknown

32. What is the highest level of school completed by Parent 2?

- Middle school/Jr. high High School College or beyond Other/unknown

Parent Household Size

33. How many people are in your parents' household? _____
Include:
- Yourself (the student), even if you don't live with your parents,
 - Your parents,
 - Your parents' other children (even if they do not live with your parents) if (a) your parents will provide more than half of their support between July 1, 2019 and June 30, 2020 or (b) the children do not qualify for any category listed in question 27 above, and
 - Other people if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2019 and June 30, 2020.
34. How many people in your parents' household (from question above) will be college students between July 1, 2019 and June 30, 2020? _____
Always count yourself as a college student. Do not include your parents. Do not include siblings who are in U.S. military service academies. You may include others only if they will attend, at least half-time in 2019-2020 a program that leads to a college degree or certificate.

Parent (and Spouse) Income

35. For 2017, have you (the Parent) completed your income tax return?
- I have completed my tax return
- I'm not going to file (skip to question 40)
36. For 2017, what is or will be your tax filing status according to your tax return?
- Single
- Head of Household
- Married Filing Jointly
- Married Filing Separately
- Qualifying Widow(er)
37. What was your (and spouse's) adjusted gross income for 2017? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.
- _____
38. Enter your (and spouse's) income tax for 2017. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10.
- _____
39. Enter your (and spouse's) exemptions for 2017. Exemptions are on IRS Form 1040—line 6d or Form 1040A—line 6d. For Form 1040EZ
- _____
40. How much did you earn from working in 2017? _____
41. How much did your spouse earn from working in 2017? _____ (write N/A if not applicable)

Student 2017 Additional Financial Information (Enter combined amounts for you and your spouse)

42. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.
- _____
43. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.
- _____
44. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
- _____
45. Taxable college grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
- _____

46. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.
47. _____
Earnings from work under a cooperative education program offered by a college.

Parent 2017 Untaxed Income (Enter combined amounts for you and your spouse)

48. 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. Don't include amounts reported in code DD (employer contributions toward employee health benefits).
49. _____
IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040—line 28 + line 32 or 1040A—line 17.
50. _____
Child support received for any of your children. Don't include foster care or adoption payments.
51. _____
Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.
52. _____
Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.
53. _____
Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.
54. _____
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.
55. _____
Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
56. _____
Other untaxed income not reported above, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. Don't include 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, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
57. _____
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

Parent and Spouse Asset Information

58. Assets	Parent
Cash, savings and checking (as of today)	\$ _____
Net worth of investments* (as of today)	\$ _____
Net worth of business (as of today)	\$ _____
Net worth of investment farm (do not include farm you live on) (as of today)	\$ _____

* Net worth is value minus debt. Investments include other real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, education IRA's, installment & land sale contracts (including mortgages held), commodities, etc.

Signatures

By signing this form, I certify that all the information provided is complete and accurate.

Student signature

Date

Spouse signature (if applicable)

Date

Parent signature

Date

Electronic and typed signatures are not acceptable.

Please submit your form by mail, fax or online at <https://ofa.colorado.edu/fileupload/>
77 UCB • Boulder, Colorado 80309-0077 • fax 303 492 0838 • www.colorado.edu/financialaid
