

2009-2010 FAFSA on the Web Pre-Application Worksheet

Before you begin your 2009-2010 FAFSA on the Web application, use this worksheet to help you collect your and your parents' (if required) financial information. This worksheet does not include all questions asked on the online FAFSA; just the ones that you might not know off the top of your head. Additional information and help is available at www.studentaid.ed.gov or e-mail the Normandale Financial Aid and Scholarship Office at finaid@normandale.edu.

*The Normandale Financial Aid and Scholarship Office **STRONGLY** encourages you to complete this worksheet **BEFORE** sitting down at a computer to file your application*

DOCUMENTS NEEDED

For the 2009-2010 school year, you will need financial information from 2008. You will also need:

- ▶ Your Social Security number (can be found on your Social Security card)
- ▶ Your driver's license number (if any)
- ▶ Your alien registration card (if you are not a U.S. citizen)
- ▶ Your 2008 W-2 forms and other records of money earned
- ▶ Your (and your spouse's if you are married) 2008 Federal Income Tax Return -IRS form 1040, 1040A, 1040EZ, foreign tax return, or tax return for Puerto Rico, another U.S. territory or one of the freely associated states.
- ▶ Your 2008 untaxed income records – child support received, workers' compensation, disability, etc.
- ▶ Your 2008 bank statements
- ▶ Your 2008 business and investment mortgage information, business and farm records, stock, bond, and other investment records
- ▶ Your parent's 2008 Federal Income Tax Return and 2008 W-2 forms (if you are a dependent student), their untaxed income records, bank statements, and investment information

Do you need to gather and report your parents' information? If you answer **no to all 13 questions below**, you **MUST** provide your parents' information. See footnote 4 on back page to see who is considered a parent for financial aid purposes.

- ▶ Were you born before 1/1/1986
- ▶ Do you already have a bachelor's degree?
- ▶ Are you married?
- ▶ Do you have children you support more than 50%?
- ▶ Do you have dependents (other than children or spouse) that live with you and receive more than half their support from you?
- ▶ As of today, are you an emancipated minor as determined by a court in your state of legal residence?
- ▶ As of today, are you in legal guardianship as determined by a court in your state of legal residence?
- ▶ At any time on or after July 1, 2008, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless?
- ▶ At any time on or after July 1, 2008, did the director of an emergency shelter program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?
- ▶ At any time on or after July 1, 2008, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?
- ▶ Are you an orphan or ward of the court?
- ▶ Are you a veteran of the U.S. Armed forces?
- ▶ Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?

2008 FINANCIAL INFORMATION: Complete the following worksheets.

Question	Circle or write in the correct answer	
	STUDENT	PARENT
What is your Social Security number?	_____	Father/ Stepfather: _____ Mother/ Stepmother: _____
What is your date of birth?	_____	Father/ Stepfather: _____ Mother/ Stepmother: _____
For 2008 have you completed your IRS income tax return?	a. I have already completed my return. b. I will file, but I have not yet completed my return. c. I'm not going to file.	a. My parents have already completed their return. b. My parents will file, but they have not yet completed their return. c. My parents are not going to file.
What income tax return did you file or will you file for 2008?	a. IRS 1040 b. IRS 1040A, 1040EZ c. Foreign Tax Return d. Tax Return for U.S. Territory, Puerto Rico or Freely Associated States	a. IRS 1040 b. IRS 1040A, 1040EZ c. Foreign Tax Return d. Tax Return for U.S. Territory, Puerto Rico or Freely Associated States
If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? (See footnote 1.)	a. Yes b. No	a. Yes b. No
What was your (and spouse's) adjusted gross income for 2008? AGI is on IRS form 1040-line 37, 1040A-line 21, or 1040EZ-line 4.	\$ _____	\$ _____
Enter the total amount of your (and spouse's) income tax for 2008. Income tax amount is on IRS form 1040-line 56, 1040A-line 35, or 1040EZ-line 11.	\$ _____	\$ _____
Enter your (and spouse's) exemptions for 2008. Exemptions are on line 6d of both IRS forms 1040 and 1040A. For 1040EZ. (See footnote 2.)	_____	_____
How much did you (and spouse) earn from working (wages, salaries, tips, combat pay, etc.) in 2008? Answer this question whether or not you filed a tax return. This information may be on your W-2 forms, or on IRS form 1040 (lines 7+12+18); 1040A-line 7, or 1040EZ-line 1.	Student \$ _____ Spouse \$ _____	Father/Stepfather \$ _____ Mother/Stepmother \$ _____
As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? Do not include student financial aid.	\$ _____	\$ _____
As of today, what is the net worth of your (and spouse's) current investments? (See footnote 3.)	\$ _____	\$ _____
As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? Do not include a farm that you live on and operate. (See footnote 3.)	\$ _____	\$ _____



Footnotes

1 In general, a person is eligible to file a 1040A or 1040EZ if he or she makes less than \$100,000, does not itemize deductions, does not receive income from his or her own business or farm, and does not receive alimony. A person is not eligible if he or she makes \$100,000 or more, itemizes deductions, receives self-employment income or alimony, or is required to file a Schedule D for capital gains.



2 For people who filed a 1040EZ: On the 1040EZ, if a person answered "you" or "spouse" on line 5, use EZ worksheet line F to determine the number of exemptions (\$3,500 equals one exemption). If a person did not check either box on line 5, enter 01 if he or she is single or 02 if he or she is married.

3 **Net worth** means current value minus debt. If net worth is one million or more, enter \$999,999. If net worth is negative, enter 0. **Investments include** real estate (do not include the home you live in), trust funds, UGMA & UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell Savings Accounts, 529 college savings plans, installment and land sale contracts (including mortgages held), commodities, etc. Investment value includes the market value of these investments as of today. Investment debt means only those debts that are related to the investments. **Investments do not include** the home you live in, cash, savings, checking accounts, or the value of life insurance and retirement plans (pension funds, annuities, non-education IRA's, Keogh plans, etc.). **Business and/or investment farm value includes** the market value of land, buildings, machinery, equipment, inventory, etc. **Business and/or investment farm debt** means only those debts for which the business or investment farm was used as collateral. **Do not include** the value of a family farm that you live on & operate. **Do not include** the value of a small business that you own & control & that has 100 or fewer full-time or full-time equivalent employees.

ADDITIONAL 2008 FINANCIAL INFORMATION

Student/Spouse	Calendar Year 2008 (Report Amounts for 12 months)	Parent(s)
\$ _____	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040-line 50 or 1040A-line 31.	\$ _____
\$ _____	Child support you paid because of divorce or separation or as a result of legal requirement; do not include support for children that you included in your (or your parents') household.	\$ _____
\$ _____	Taxable earnings from Federal and State Work-study or other need-based work programs, such as employment portions of fellowships and assistantships.	\$ _____
\$ _____	Student grant and scholarship aid reported to the IRS in your (or your parents') adjusted gross income; includes AmeriCorps benefits (awards, living allowances, and interest accrual payments) as well as grant or scholarship portions of fellowships and assistantships.	\$ _____
\$ _____	Combat pay or special combat pay included in your adjusted gross income (W-2, Box 12, Code Q).	\$ _____
\$ _____	 Total for 12 months 	\$ _____

2008 UNTAXED INCOME

Student/Spouse	Calendar Year 2008 (Report Amounts for 12 months)	Parent(s)
\$ _____	Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including but not limited to, amounts reported on the W-2 Form in boxes 12a through 12d, codes D, E, F, G, H, and S	\$ _____
\$ _____	IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040-total of lines 28+32 or 1040A-line 17.	\$ _____
\$ _____	Child support received for all children; do not include foster care or adoption payments	\$ _____
\$ _____	Tax exempt interest income from IRS Form 1040-line 8b or 1040A-line 8b	\$ _____
\$ _____	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.	\$ _____
\$ _____	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.	\$ _____
\$ _____	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$ _____
\$ _____	Veterans' non-education benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances	\$ _____
\$ _____	Any other untaxed income or benefits not reported, such as workers' compensation, disability, etc. Do not include student aid, earned income, child tax credits, welfare payments, untaxed social security benefits, Workforce Investment Act educational benefits, non-tax filers' combat pay, or benefits from flexible spending arrangements, e.g. cafeteria plans.	\$ _____
\$ _____	Money received or paid on your behalf (e.g. bills) not reported elsewhere on this form.	XXXXXX
\$ _____	 Total for 12 months 	\$ _____

NEXT STEPS: Now that you are done with this worksheet...

- ▶ Decide how to sign your FAFSA. The Financial Aid and Scholarship Office Staff strongly suggests you electronically sign with your Federal PIN. Your parents can sign electronically, too. Forgot your PIN or your parents need a PIN? Go to www.pin.ed.gov.
 - ▶ Sit down at a computer, go to www.fafsa.ed.gov and file your 2009-2010 FAFSA (Free Application for Federal Student Aid).
 - ▶ Normandale's priority deadline for 2009-2010 is **April 1, 2009**. By this date, **you MUST have filed your FAFSA and completed your file** with the Normandale Financial Aid and Scholarship Office.
 - ▶ The deadline to apply for aid for the 2009-2010 school year will be in early May, 2010. The deadline to apply for aid for summer, 2010, will be early June, 2010. **Check our web site for all deadlines that apply.**
 - ▶ You may receive financial aid from only one school for the same period of enrollment.
 - ▶ If you or your family has unusual circumstances that might affect your need for student financial aid (such as loss of employment), file your FAFSA and then consult with the Normandale Financial Aid and Scholarship Office.
-
-

Footnotes

- 4 **The following information indentifies who is considered a parent on the FAFSA application (NOTE: Grandparents, foster parents and legal guardians are not parents for this purpose unless they have adopted you).**
- *If your parents are both living and married to each other, answer the questions about them (you will be providing information about two people).*
 - *If your parent is widowed or single, answer the questions about that parent (you will be providing information about one person). If your widowed parent is remarried as of today, answer the questions about that parent and the person whom your parent married (you will be providing information about two people).*
 - *If your parents have divorced or separated and have not remarried, answer the questions about the parent you lived with more during the past 12 months. If you did not live with one parent more than the other, give answers about the parent who provided more financial support during the last 12 months, or during the most recent year that you actually were supported by a parent (you will be providing information about one person).*
 - *If the above parent is remarried as of today, answer the questions on the rest of the form about that parent and the person whom your parent married (you will be providing information about two people).*

Normandale *community college*

Telephone: (952) 487-8250 • TTY (952) 487-7032

E-mail: finaid@normandale.edu • Web address: www.normandale.edu/financialaid

Equal Opportunity Educator/Employer

*Normandale Community College is an affirmative action, equal opportunity educator and employer.
The information in this document is available in alternative formats to individuals with disability upon request.*