

## Pre-Application Worksheet

You can use this worksheet to help you collect your family's financial information before you begin your online PROFILE Application. You can print instructions by returning to the previous screen and clicking on "application instructions/help". As you are completing your online application, you will find more detailed online help.

The worksheet contains questions found in Sections A through P of the PROFILE Application. In general, these are standard questions that all families must complete.

- When you complete your online application, you may find additional questions in Section Q that are not found on the pre-application worksheet. These are questions required by one or more of the colleges or scholarship programs to which you are applying. If your customized application does not contain a Section Q, it means that none of the colleges and programs to which you are applying require questions beyond those collected in Sections A through P.
- Based on your dependency status, you may not be required to complete all of the questions in Sections A through O. When you complete your online PROFILE Application, these questions will not be presented to you for completion. For example, if you are a dependent student, you will not be asked to complete Questions 1 and 2, or Questions 24 and 25.

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

# Pre-Application Worksheet

## Section A - Student's Information

(If you are a dependent student, skip Questions 1 and 2.)

1. How many people are in the student's (and spouse's) household? Always include the student (and spouse). List their names and give information about them in Section M.

2. Of the number in 1, how many will be college students enrolled at least half-time between July 1, 2003 and June 30, 2004? Include yourself.

3. What is the student's state of legal residence?

4 a What is the student's citizenship status?

- U.S. citizen (Skip to question 5.)
- Eligible non-citizen (Skip to Question 5.)
- Neither of the above (Answer 'b' and 'c' below.)

b Country of citizenship?

c Visa classification?  F1  F2  J  J2  G  Other

## Section B - Student's 2002 Income & Benefits

Questions 5-14 ask for information about the student's (and spouse's) income and benefits. If married, include spouse's information in Sections B, C, D, E and F.

5. The following 2002 U.S. Income Tax return figures are: (Fill in only one oval.)

- estimated. Will file IRS Form 1040EZ, 1040A, or Telefile. Go to 6.
- estimated. Will file IRS Form 1040. Go to 6.
- from a completed IRS Form 1040EZ, 1040A, or Telefile. Go to 6.
- from a completed IRS Form 1040. Go to 6.
- a tax return will not be filed. Skip to 10.

6. 2002 total number of exemptions (IRS Form 1040, line 6d or 1040A, line 6d or 1040EZ or Telefile)

7. 2002 Adjusted Gross Income from IRS Form 1040, line 35 or 1040A, line 21 or 1040EZ, line 4 or Telefile, line I \$

8 a 2002 U.S. income tax paid (IRS Form 1040, line 55 or 1040A, line 33 or 1040EZ, line 10 or Telefile, line K) \$

b 2002 Education Credits - Hope and Lifetime Learning (IRS Form 1040, line 48 or 1040a, line 31) \$

9. 2002 itemized deductions (IRS Form 1040, Schedule A, line 28. Fill in "0" if deductions were not itemized.) \$

10. 2002 income earned from work by student \$

11. 2002 income earned from work by student's spouse \$

12. 2002 dividend and interest income \$

13. 2002 untaxed income and benefits (Give total amount for year.)

- a Social security benefits (untaxed portion only) \$
- b Welfare benefits, including TANF \$
- c Child support received for all children \$
- d Earned Income Credit (IRS Form 1040, line 64 or 1040A, line 41 or 1040EZ, line 8 or Telefile, line L) \$
- e Other - write total from instruction worksheet at the end of this document. \$

14. 2002 earnings from Federal Work-Study or other need-based work programs plus any grant, fellowship, scholarship, and assistantship aid reported to the IRS in your adjusted gross income \$

## Section C - Student's Assets

Questions 15-22 ask for information about the student's (and spouse's) assets. Include trust accounts in Section D.

15. Cash, savings, and checking accounts (as of today) \$

16. Total value of IRA, Keogh, 401k, 403b, etc. accounts as of December 31, 2002 \$

17. Investments (Including Uniform Gifts to Minors)

What is it worth today? \$

What is owed on it? \$

**18. Home**  
 What is it worth today? (Renters write in "0")   
 What is owed on it?

**19. Other real estate**  
 What is it worth today?   
 What is owed on it?

**20. Business and farm**  
 What is it worth today?   
 What is owed on it?

**21.** If a farm is included in 20, is the student living on the farm?  Yes  No

**22.** If student owns home, give  
 a year purchased   
 b purchase price

**Section D - Student's Trust Information**

**23. a** Total value of all trust(s)   
 b Is any income or part of the principal currently available?  Yes  No  
 c Who established the trust(s)?  Student's parents  Other

**Section E - Student's 2002 Expenses**

(If you are a dependent student, skip Questions 24 and 25.)

**24.** 2002 child support paid because of divorce or separation   
**25.** 2002 medical and dental expenses not covered by insurance

**Section F - Student's Expected Summer/School-Year Resources for 2003-2004**

**26.** Student's veterans benefits (July 1, 2003 - June 30, 2004)  
 Amount per month   
 Number of months

**27.** Student's (and spouse's) resources (Don't enter monthly amounts.)

**a** Student's wages, salaries, tips, etc.  
 Summer 2003 (3 months)   
 School year 2003-2004 (9 months)

**b** Spouse's wages, salaries, tips, etc.  
 Summer 2003 (3 months)   
 School year 2003-2004 (9 months)

**c** Other taxable income  
 Summer 2003 (3 months)   
 School year 2003-2004 (9 months)

**d** Untaxed income and benefits  
 Summer 2003 (3 months)   
 School year 2003-2004 (9 months)

**e** Grants, scholarships, fellowships, etc. from sources other than the colleges or universities to which the student is applying (List sources in Section P)

**f** Tuition benefits from the parents' and/or the student's or spouse's employer

**g** Amount the student's parent(s) think they will be able to pay for 2003-2004 college expenses

**h** Amounts expected from prepaid tuition plan withdrawals, other relatives, spouse's parents, and all other sources (List sources and amounts in Section P.)

**Section G - Parents' Household Information**

**28.** How many people are in your parents' household? Always include the student and parents. List their names and give information about them in Section M.

29. Of the number in 28, how many will be college students enrolled at least half-time between July 1, 2003 and June 30, 2004?  
**Do not include parents.** Include the student.

30. How many parents will be in college at least half-time in 2003-2004?  Neither Parent  One Parent  Both Parent

31. What is the current marital status of your parents?  Single  Separated  Widowed  
(Fill in only one oval.)  Married/Remarried  Divorced

32. What is your parents' state of legal residence?

### Section H - Parents' Expenses

33. Child support paid because of divorce or separation

2002 \$   
Expected 2003 \$

34. Repayment of parents' educational loans

2002 \$   
Expected 2003 \$

35. Medical and dental expenses not covered by insurance

2002 \$   
Expected 2003 \$

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

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

2002 \$   
Expected 2003 \$

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

2002   
Expected 2003

### Section I - Parents' Assets

*If parents own all or part of a business or farm, enter its name and the percent of ownership in Section P.*

37. Cash, savings, and checking accounts (as of today)

38. a Total value of assets held in the names of the student's brothers and sisters who are under age 19 and not college students

\$

b Total value of assets held in Section 529 prepaid tuition plans for the student's brothers and sisters

\$

c Total value of assets held in Section 529 prepaid tuition plans for the student

\$

39. Investments

What is it worth today? \$

What is owed on it? \$

40. Home

a What is it worth today? (Renters fill in "0" and skip to 40d.)

\$

What is owed on it?

\$

b Year purchased

c Purchase price

\$

d Monthly home mortgage or rental payment (If none, explain in Section P)

\$

41. Business

What is it worth today? \$

What is owed on it? \$

42. Farm

a What is it worth today? \$

What is owed on it? \$

b Does family live on the farm?  Yes  No

43. Other real estate
- a What is it worth today?
  - What is owed on it?
  - b Year purchased
  - c Purchase price

**Section J - Parents' 2001 Income & Benefits**

- 44. 2001 Adjusted Gross Income (IRS Form 1040, line 33 or 1040A, line 19 or 1040EZ, line 4 or Telefile, line I)
- 45. 2001 U.S. income tax paid (IRS Form 1040, line 52 or, 1040A, line 34 or 1040EZ, line 11 or Telefile, line K)
- 46. 2001 itemized deductions (IRS Form 1040, Schedule A, line 28. Enter "0" if deductions were not itemized.)
- 47. 2001 untaxed income and benefits (Include the same types of income that are listed in 55 a-k.)

**Section K - Parents' 2002 Income & Benefits**

48. The following 2002 U.S. income tax return figures are (Fill in only one oval.)
- estimated. Will file IRS Form 1040EZ, 1040A, or Telefile. Go to 49.
  - estimated. Will file IRS Form 1040. Go to 49.
  - from a completed IRS Form 1040EZ, 1040A, or Telefile. Go to 49.
  - from a completed IRS Form 1040. Go to 49.
  - a tax return will not be filed. Skip to 53.

- 49. 2002 total number of exemptions (IRS Form 1040, line 6d or 1040A, line 6d or 1040EZ or Telefile.)

- 50. a Wages, salaries, tips (IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1)
- b Interest income (IRS Form 1040, line 8a or 1040A, line 8a or 1040EZ, line 2 or Telefile, line C)
- c Dividend income (IRS Form 1040, line 9 or 1040A, line 9)
- d Net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc. (IRS Form 1040, lines 12, 17, and 18) (If a loss, enter the amount in (parentheses).
- e Other taxable income such as alimony received, capital gains (or losses), pensions, annuities, etc. (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 or Telefile, line D)
- f Adjustments to income (IRS Form 1040, line 34 or 1040A, line 20)
- g 2002 Adjusted Gross Income (IRS Form 1040, line 35 or 1040A, line 21 or 1040EZ, line 4 or Telefile line I). This entry is the sum of 50a to 50e, minus 50f.

- 51. a 2002 U.S. income tax paid (IRS Form 1040, line 55, 1040A, line 36 or 1040EZ, line 10 or Telefile, line K)
- b 2002 Education Credits - Hope and Lifetime Learning (IRS Form 1040, line 48 or 1040A, line 31)

- 52. 2002 itemized deductions (IRS Form 1040, Schedule A, line 28. Fill in "0" if deductions were not itemized.)

- 53. 2002 income earned from work by father/stepfather

- 54. 2002 income earned from work by mother/stepmother

- 55. 2002 untaxed income and benefits (Give total amount for the year. Do not give monthly amounts.)
- a Social security benefits received (untaxed portion only)
- b Welfare benefits, including TANF
- c Child support received for all children
- d Deductible IRA and/or SEP, SIMPLE, or Keogh payments
- 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 (IRS Form 1040, line 64 or 1040A, line 41 or 1040EZ, line 8 or Telefile, line L)
- h Housing, food, and other living allowances received by military, clergy, and others
- i Tax-exempt interest income (IRS Form 1040, line 8b or 1040A, line 8b)
- j Foreign income exclusion (IRS Form 2555, line 43 or Form 2555EZ, line 18)
- k Other - write in the total from the worksheet in the instructions at the end of this document.

**Section L - Parents' 2003 Expected Income & Benefits**

If the expected total income and benefits will differ from the 2002 total income by \$3,000 or more, explain in Section P.

56. 2003 income earned from work by father \$

57. 2003 income earned from work by mother \$

58. 2003 other taxable income \$

59. 2003 untaxed income and benefits (See 55a-k.) \$

**Section M - Family Member Listing**

Give information for all family members entered in question 1 or 28. Only six family members are shown here but you will be able to enter up to seven family members in addition to the student on our website. **Failure to complete all information could reduce your aid eligibility.** If there are more than seven, list first those who will be in school or college at least half-time. List the others in Section P.

**Question 60.**

**Student - Family Member 1**

Full name of family member  Claimed by parents as tax exemption in 2002?  Yes  No

2002-2003 school year

Name of school or college  Year in school

Scholarships and grants \$  Parents' contribution \$

**Family Member 2**

Full name of family member  Claimed by parents as tax exemption in 2002?  Yes  No

Relationship to student:  Student's parent  Student's stepparent  Student's brother or sister  
Age:   Student's husband or wife  Student's son or daughter  Student's grandparent  
 Student's stepbrother/stepsisiter  Other (explain in Section P)

2002-2003 school year

Name of school or college  Year in school

Scholarships and grants  Parents' contribution \$

2003-2004 school year

Attend college at least one term  Full-time  Half-time  Does not apply

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  Claimed by parents as tax exemption in 2002?  Yes  No

Relationship to student:  Student's parent  Student's stepparent  Student's brother or sister  
Age:   Student's husband or wife  Student's son or daughter  Student's grandparent  
 Student's stepbrother/stepsisiter  Other (explain in Section P)

2002-2003 school year

Name of school or college  Year in school

Scholarships and grants \$  Parents' contribution \$

2003-2004 school year

Attend college at least one term  Full-time  Half-time  Does not apply

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 4**

Full name of family member  Claimed by parents as tax exemption in 2002?  Yes  No

Relationship to student:  Student's parent  Student's stepparent  Student's brother or sister  
 Age:   Student's husband or wife  Student's son or daughter  Student's grandparent  
 Student's stepbrother/stepmother  Other (explain in Section P)

2002-2003 school year

Name of school or college  Year in school   
 Scholarships and grants \$  Parents' contribution \$

2003-2004 school year

Attend college at least one term  Full-time  Half-time  Does not apply  
 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  Claimed by parents as tax exemption in 2002?  Yes  No

Relationship to student:  Student's parent  Student's stepparent  Student's brother or sister  
 Age:   Student's husband or wife  Student's son or daughter  Student's grandparent  
 Student's stepbrother/stepmother  Other (explain in Section P)

2002-2003 school year

Name of school or college  Year in school   
 Scholarships and grants \$  Parents' contribution \$

2003-2004 school year

Attend college at least one term  Full-time  Half-time  Does not apply  
 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  Claimed by parents as tax exemption in 2002?  Yes  No

Relationship to student:  Student's parent  Student's stepparent  Student's brother or sister  
 Age:   Student's husband or wife  Student's son or daughter  Student's grandparent  
 Student's stepbrother/stepmother  Other (explain in Section P)

2002-2003 school year

Name of school or college  Year in school   
 Scholarships and grants \$  Parents' contribution \$

2003-2004 school year

Attend college at least one term  Full-time  Half-time  Does not apply  
 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 N - Parents' Information

(to be answered by the parent(s) completing this form)

61. a Select one:  Father  Stepfather  Legal guardian  Other (Explain in Section P)

b Name

c Age

d Select if:  Self-employed  Unemployed

e If unemployed enter date unemployment began:

f Occupation

g Employer

h Number of years employed by employer listed above

i Work telephone

j Retirement plans available (Check all that apply.)

Social security  Civil service/state  Military

Union/employer  IRA/Keogh/tax-deferred  Other

62. a Select one:  Mother  Stepmother  Legal guardian  Other (Explain in Section P)

b Name

c Age

d Select if:  Self-employed  Unemployed

e If unemployed enter date unemployment began:

f Occupation

g Employer

h Number of years employed by employer listed above

i Work telephone

j Retirement plans available (Check all that apply.)

Social security  Civil service/state  Military

Union/employer  IRA/Keogh/tax-deferred  Other

## Parent Loan Information

The questions that follow are intended to provide the student's family with options for financing the parents' share of the student's college costs. Many families choose to borrow through the Federal Parent Loan for Undergraduate Students (PLUS) Program to supplement the financial aid offer. This program, as well as most private loan programs, requires a check of parent credit worthiness to qualify.

Families that answer the questions on this page will:

- get information about their eligibility to borrow through the PLUS program.
- learn what their monthly payment responsibilities would be, should they decide to borrow (a valid email address is required to receive financing guidance).
- learn about loan programs sponsored by the College Board.

By answering Questions **B-G** below, you are authorizing the College Board (or its agent), to use the information you provide below and the student's name to evaluate the parents' credit record and report the results of the credit evaluation to the parent whose information is provided below. A positive credit rating will mean that the parent is pre-approved to borrow a PLUS Loan from most lenders, including the College Board's CollegeCredit PLUS Loan program, should additional financial assistance be necessary. (Most other lenders use the same criteria in approving families' applications for PLUS Loans.) The College Board will not share this information with the student, the student's colleges, or anyone else. Reporting of credit worthiness results will begin in February 2003 to ensure that your credit results remain valid when you are ready to apply for a PLUS loan. (The results are valid for only 180 days.)

You may skip the questions below if you are not interested in learning about your eligibility for the Federal PLUS program.

**A.** Does the parent want to be considered for an educational loan to cover college costs?  Yes  No

If you answered "Yes", complete Questions **B-G**.

B. Parent's name:     
Last name First name M.I.

C. Parent's home address:   
Number, street, and apartment number

City State Zip code

D. Telephone number:     
Area code

E. Parent's social security number:

F. Parent's date of birth:     
Month Day Year

G. Parent's e-mail address:

**Section O - Information About Noncustodial Parent**

*(to be answered by the parent who completes this form if the student's biological or adoptive parents are divorced, separated, or were never married to each other)*

- 63 a Noncustodial parent's name:
- b Home address- street
- c Home address- city, state, zip
- d Occupation/Employer
- e Year of separation
- f Year of divorce
- g According to court order, when will support for the student end? (MM/YYYY)
- h Who last claimed the student as a tax exemption?
- i Year last claimed?
- j How much does the noncustodial parent plan to contribute to the student's education for the 2003-2004 school year? (Do not include this amount in 27g.)
- k Is there an agreement specifying this contribution for the student's education?  Yes  No

**Section P - 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. Also give information for any outside scholarships you have been awarded. If more space is needed, use sheets of paper and send them directly to your schools and programs. When online, please limit your responses to no more than 27 lines of information.*

# PROFILE Online 2003-2004 Worksheet

## Question 13e

Complete the worksheet below and calculate the total at the end of the questions. Enter the total in question 13e. **Don't include:** any income reported elsewhere on the PROFILE Application, money from student financial aid, food stamps, "rollover" pensions, Workforce Investments Act educational benefits, or gifts and support, other than money, received from friends or relatives.

Deductible IRA and/or SEP, SIMPLE, or Keogh payments from IRS Form 1040, total of lines 24 and 31 or 1040A, line 17	\$	<input type="text"/>
Tax exempt interest income from IRS Form 1040, line 8b or 1040A, line 8b	+	<input type="text"/>
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-12d, codes D, E, F, G, H, and S on the W-2 Form. Include untaxed payments to 401(k) and 403(b) plans.	+	<input type="text"/>
Additional child tax credit from IRS Form 1040, line 66 or 1040A, line 42	+	<input type="text"/>
Workers' Compensation	+	<input type="text"/>
Veterans non-educational benefits such as Death Pension, Disability, etc.	+	<input type="text"/>
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	+	<input type="text"/>
Cash received or any money paid on the student's behalf, not reported elsewhere on this form	+	<input type="text"/>
VA educational work-study allowances	+	<input type="text"/>
Any other untaxed income and benefits	+	<input type="text"/>
<b>TOTAL =</b>	\$	<input type="text"/>

## Question 55k

Complete the worksheet below and calculate the total at the end of the questions. Enter the total in question 55k. **Don't include:** any income reported elsewhere on the PROFILE Application, money from student financial aid, Workforce Investments Act educational benefits, or gifts and support, other than money, received from friends or relatives.

Untaxed portions of IRA distributions from IRS forms (excluding "rollovers")	\$	<input type="text"/>
Untaxed portions of pensions from IRS forms (excluding "rollovers")	+	<input type="text"/>
Additional child tax credit from IRS Form 1040, line 66 or 1040A, line 42	+	<input type="text"/>
Veterans non-educational benefits such as Disability, Death Pension, Dependency & Indemnity Compensation	+	<input type="text"/>
Workers' Compensation	+	<input type="text"/>
Cash received or any money paid on your behalf (Don't include child support.)	+	<input type="text"/>
Black Lung Benefits, Refugee Assistance	+	<input type="text"/>
Credit for federal tax on special fuels	+	<input type="text"/>
Untaxed portions of Railroad Retirement benefits	+	<input type="text"/>
Any other untaxed income and benefits	+	<input type="text"/>
<b>TOTAL =</b>	\$	<input type="text"/>