

2015 – 2016 USC Parent Information Worksheet Instructions for Need Access Application

This worksheet represents the questions that are typically asked on the Need Access application. When you log in to complete the application online, you may see additional questions that are not listed here, or you may not see questions listed below in the online application.

Note: Asterisks indicate a question that may not be left blank in the application.

Parent 1 Information

Parent 1 Name - Enter the name of your main supporting parent or parent who most recently provided the greatest financial support (Ref. 31c):*

Enter this parent's name. The main supporting parent is defined as the parent or guardian who the student lived with the most during the last 12 months. If the student didn't live with either parent or guardian more than the other in the last 12 months, it is the parent or guardian that provided the most financial support during that time. If neither parent provided greater support during the last 12 months, it is the parent or guardian who most recently provided the greatest financial support.

Date of Birth (Ref. 31cm):*

Enter this parent's birth date. Example: 10/31/1960

Street (Ref. 31d):*

Enter the street address for the parent's home.

City (Ref. 31e):*

Enter the city of this parent's home address.

State (Ref. 31f):

Select the State/Province/Territory from the list presented in Appendix A. If no corresponding entry is on this list, select the last entry.

Zip Code (Ref. 31g):

Enter the zip code of this parent's home address.

Territory/Country (Ref. 31h):

For non-U.S. addresses, enter the name of the territory and/or country.

Parent 1 E-mail Address (Ref. c237pf):

Enter this parent's e-mail address. Example: name@domain.com

Current Marital Status of Parent 1 (Ref. 32v):*

Select the current marital status of the parent whose information you listed above as Parent 1.

1. Single
2. Married/unmarried and both parents living together
3. Separated
4. Divorced
5. Widowed

Occupation (Ref. 31i):*

Enter this parent's occupation. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Job Title (Ref. 31j):*

Enter this parent's job title. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Employer (Ref. 31k):

Enter the employer of this parent. Enter none if the parent is not employed or retired. Enter self-employed if the parent is self-employed.

Number of Years with this Employer (Ref. 31m):

Enter the number of years this parent has been employed by this employer. If employed less than one year, is not employed, or is retired, enter 0.

Biological Parents' Marital Status (Ref. CST334):*

What is the current marital status of the student's biological or adoptive parents? Select single adoptive parent if the student's adoptive parent was single at the time of the adoption and the student was not later adopted by a spouse/partner of the parent. Select single – donor conceived child if the student's biological parent was single at the time of conception and the student was not later adopted by a spouse/partner of the parent.

1. Married
2. Separated
3. Divorced
4. Never Married, live separately
5. Never married, live together
6. Widowed
7. Single adoptive parent
8. Single – donor conceived child

Parent 2 Information

Parent 2 Name - Enter the name of Parent 1's spouse, or, if unmarried and both parents live together, then enter the name of the student's other legal parent. (Ref. 32c):*

Enter this parent's name.

Relationship to Student (Ref. 32b):*

Select the entry corresponding to the relationship of the appropriate parent to the student.

1. Parent
2. Stepparent
3. Guardian
4. None

Date of Birth (Ref. 32cm):*

Enter this parent's birth date. Example: 11/27/1967

Street (Ref. 32d):*

Enter the street address for the parent's home.

City (Ref. 32e):*

Enter the city of this parent's home address.

State (Ref. 32f):

Select the State/Province/Territory from the list presented in Appendix A. If no corresponding entry is on this list, select the last entry.

Zip Code (Ref. 32g):

Enter the zip code of this parent's home address.

Territory/Country (Ref. 32h):

For non-U.S. addresses, enter the name of the territory and/or country.

Parent 2 E-mail Address (Ref. c237pm):

Enter this parent's e-mail address. Example: name@domain.com

Occupation (Ref. 32i):*

Enter this parent's occupation. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Job Title (Ref. 32j):*

Enter this parent's job title. If the parent is not employed, enter not employed. If the parent is retired, enter retired.

Employer (Ref. 32k):

Enter the employer of this parent. Enter none if the parent is not employed or retired. Enter self-employed if the parent is self-employed.

Number of Years with this Employer (Ref. 32m):

Enter the number of years this parent has been employed by this employer. If employed less than one year, is not employed, or is retired, enter 0.

Parents' Household Information**Phone Number (Ref. 32p):***

Enter the parents' phone number. Example: 555-555-1212

Parent Last Claimed Student as Dependent (Ref. 32qp):*

Enter the name of the parent who most recently claimed the student applicant as a tax dependent. If the parents never filed U.S. tax returns because they had no U.S. income, enter n/a.

Last Year Claimed (Ref. 32qy):*

Enter the four digits of the year in which the student applicant was most recently claimed by a parent as a tax dependent. (If the parents never filed U.S. income tax returns because they had no U.S. income, enter the student's year of birth. If the parent has not yet completed the current year's tax return and the student will be claimed by the parent, enter the current year.)

Parents' Release of Financial Data (Ref. 32r):*

If the student discusses the financial aid application with the school's financial aid officer, do you authorize the officer to disclose your information to the student?

1. Yes
2. No

Number of Family Members Financially Supported by Parents – Including Student Applicant (Ref. 32s):*

Enter the number of people that the parent(s) will financially support between July 1, 2015 and June 30, 2016.

Include parent(s), and ALWAYS INCLUDE the student applicant, even if the student applicant does not physically live with the parent(s) and/or is not currently supported by the parent(s).

Include other people only if they live with and get more than half of their support from the parents and will continue to receive this support between July 1, 2015 and June 30, 2016. (If you include anyone other than the parent(s) and student applicant, you must list them in the Parents' Other Household Members Section.)

Support includes money, gifts, loans, housing, food, clothes, vehicle, medical and dental care, payment of college costs, etc. If the student completes this section for the parents, be sure not to include any dependents of the student. This question is for dependents of the parents only.

Here are a couple of examples:

- 2 people: One parent (single/ divorced/ separated/widowed) and student applicant
- 3 people: Two married parents and student applicant
- 4 people: Two married parents, student applicant and one other child

Number in College – Including Student Applicant (Ref. 32t):*

Enter the number of people in the parents' household, INCLUDING the STUDENT APPLICANT, who will be attending college, graduate/professional school, or other school beyond the high school level between July 1, 2015, and June 30, 2016, and who will be enrolled at least half time.

Number of Parents in College (Ref. 32u):*

How many of the student applicant's parents will be attending college at least half time in 2015-2016?

1. None
2. One
3. Two

Date of Divorce/Separation - Month (Ref. 32wm):

If the student applicant's natural parents are divorced or separated, enter the number of the month the parents were divorced or separated.

Date of Divorce/Separation - Year (Ref. 32wy):

If the student applicant's natural parents are divorced or separated, enter the four digit year the parents were divorced or separated.

Date of Remarriage - Month (Ref. 32wrm):

If the parent completing this portion of the application has divorced the student applicant's other natural parent and remarried, enter the number of the month of the remarriage.

Date of Remarriage - Year (Ref. 32wry):

If the parent completing this portion of the application has divorced the student applicant's other natural parent and remarried, enter the four digit year of the remarriage.

State of Legal Residence (Ref. 32x):

Select the State/Province/Territory from the list presented in Appendix A. If no corresponding entry is on this list, select the last entry.

Parents Living Abroad (Ref. c20p):*

Are the student applicant's parents living abroad? If yes, U.S. citizens and permanent residents with parents living abroad and having foreign earned income or assets should provide details in the Special Circumstances section.

1. Yes
2. No

Income from non-U.S. Sources in 2014 (Ref. 32z):*

Are the parents non-U.S. citizens whose income in 2014 came primarily from non-U.S. sources?

1. Yes
2. No

Federal Benefits Received in 2013 or 2014 (Ref. 32tt):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2013 or 2014 from any of the following qualifying programs, OR if as of today you or your spouse are classified as a dislocated worker:

1. Yes
2. No

Qualifying Programs:

- Supplemental Security Income Program (SSI)
- Food Stamp Program
- Free and Reduced Price School Lunch Program
- Temporary Assistance for Needy Families (TANF)
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

A dislocated worker is a person who:

- has been laid off or received a lay-off notice from a job; is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- was self-employed but unemployed due to economic conditions or a natural disaster; or is a displaced homemaker.

Supplemental Security Income (Ref. CST225):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Supplemental Security Income.

1. Yes
2. No

Food Stamps (SNAP) (Ref. CST226):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Food Stamps or SNAP.

1. Yes
2. No

Free or Reduced Price Lunch Program (Ref. CST227):*

Select Yes if you, your spouse, or your dependent(s) received aid during 2014 or 2013 from Free and Reduced Price School Lunch Program.

1. Yes
2. No

Temporary Assistance for Needy Families (TANF) (Ref. CST228):*

Select Yes if you or your spouse, received aid during 2014 or 2013 from Temporary Assistance for Needy Families (TANF).

1. Yes
2. No

Special Supplemental Nutrition Program for Women, Infants and Children (WIC) (Ref. CST229):*

Select Yes if you or your spouse received aid during 2014 or 2013 from Special Supplemental Nutrition Program for Women, Infants and Children (WIC).

1. Yes
2. No

Dislocated Worker (Ref. CST230):*

Select Yes if as of today you or your spouse are classified as a dislocated worker. In general, a person may be considered a dislocated worker if he or she:

- Is receiving unemployment benefits due to being laid off or losing a job and is unlikely to return to a previous occupation;
- Has been laid off or received a lay-off notice from a job;
- Was self-employed but is now unemployed due to economic conditions or natural disaster; or
- Is a displaced homemaker. A displaced homemaker is generally a person who previously provided unpaid services to the family (e.g., a stay-at-home mom or dad), is no longer supported by the husband or wife, is unemployed or underemployed, and is having trouble finding or upgrading employment.

If a person quits work, generally he or she is not considered a dislocated worker even if, for example, the person is receiving unemployment benefits.

1. Yes
2. No

Parents' Income and Expenses - 2014**Source of Following U.S. Tax Figures (Ref. 33a):***

Select the entry corresponding to the source of 2014 tax figures to be completed below.

1. Completed IRS Form 1040A or 1040EZ
2. Completed IRS Form 1040
3. Estimated IRS Form 1040A or 1040EZ
4. Estimated IRS Form 1040
5. Tax return will not be filed
6. Completed IRS Form 1040NR
7. Estimated IRS Form 1040NR

Number of Exemptions - 2014 (Ref. 33b):*

Enter number of exemptions claimed for 2014 from:

- IRS Form 1040, line 6d, or
- IRS Form 1040A, line 6d.

If you (and your spouse) used the 1040EZ and checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions. If neither box on line 5 is checked, enter 1 if single, or 2 if married.

Adjusted Gross Income - 2014 (Ref. 33c):*

Enter 2014 adjusted gross income from:

- IRS Form 1040, line 37, or
- IRS Form 1040A, line 21, or
- IRS Form 1040EZ, line 4.

Itemized Deductions - 2014 (Ref. 33d):*

Enter the amount from Form 1040, Schedule A, line 29. If deductions were not itemized or if a Form 1040A or 1040EZ was filed, enter 0. (Business or Farm owners should not use any amounts from Schedules C or F.)

U.S. Income Tax Paid - 2014 (Ref. 33e):*

Enter the amount of U.S. income tax paid from:

- IRS Form 1040, line 55, or
- IRS Form 1040A, line 35, or
- IRS Form 1040EZ, line 10.

Do not include any FICA, self-employment or other taxes.

Do not copy the amount of "federal income tax withheld" from a W-2 form.

Parent 1's Earned Income - 2014 (Ref. 33f):*

Enter the amount of income earned from work by Parent 1 during this time period. Include wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted.

Parent 2's Earned Income - 2014 (Ref. 33g):*

Enter the amount of income earned from work by Parent 2 during this time period. Include wages, salaries, tips and bonuses. Include any self-employment or farm earnings. Enter the amount earned before any taxes are deducted.

Interest Income - 2014 (Ref. 33h):*

Enter the amount of interest income received from:

- IRS Form 1040 line 8a, or
- IRS Form 1040A line 8a, or
- IRS Form 1040EZ line 2.

If you will not file an IRS tax form, enter the total amount of interest income you received in 2014.

Dividend Income - 2014 (Ref. 33i):*

Enter the amount of dividend income received from:

- IRS Form 1040 line 9a, or
- IRS Form 1040A line 9a.

If you will not file an IRS tax form, enter the total amount of dividend income you received in 2014.

Other Taxable Income - 2014 (Ref. 33j):*

Enter the total amount of other taxable income reported on IRS Form 1040 or 1040NR for 2014. Include alimony received, business and farm income, capital gains, pensions, annuities, rents, unemployment compensation and social security.

Earned Income Credit - 2014 (Ref. 33k):*

Enter the amount of Earned Income Credit for 2014 from:

- IRS Form 1040, line 64a, or
- IRS Form 1040A, line 38a, or
- IRS Form 1040EZ, line 8a.

Social Security Benefits - 2014 (Ref. 33m):*

Enter the amount of untaxed social security benefits (including Supplemental Security Income) received in 2014. Do not include any benefits included under "Adjusted Gross Income-2014" above. Write in the total for the year, not the monthly amounts. Include any amounts received for children.

AFDC/TANF - 2014 (Ref. 33n):*

Enter the total amount of benefits received in 2014 from Aid to Families with Dependent Children or Temporary Assistance for Needy Families. (These are usually called AFDC, ADC, or TANF benefits.) Write in the total for the year, not the monthly amounts. Do not include any social security benefits here.

Child Support Received - 2014 (Ref. 33o):*

Enter the amount of child support received for all children in 2014.

Other Untaxed Income/Benefits - 2014 (Ref. 33p):*

USC applicants should enter 0 for this question and answer the more detailed questions regarding other untaxed income/benefits which follow.

Medical/Dental Expense - 2014 (Ref. 33q):*

Enter the total amount PAID in 2014 for medical and dental expenses (including insurance premiums). Do not include amounts covered by insurance, your company medical reimbursement account (flexible spending account), or self-employed health deductions from IRS form 1040. If deductions were itemized on the 2014 U.S. income tax return, enter the amount from IRS Form 1040, Schedule A, line 1.

Elementary/Junior/High School Tuition - 2014 (Ref. 33r):*

Enter the total amount of private school tuition paid in 2014 for elementary, junior high and high school for all dependent children. (Tuition does not include room, board, books, transportation, etc.)

Number of Children's Tuition Paid - 2014 (Ref. 33s):*

Enter the number of dependent children for whom the amount given above was paid in 2014.

Child Support Paid - 2014 (Ref. 33t):*

Enter the amount of child support you paid in 2014.

Education Credits Received - 2014 (Ref. 33u):*

Enter the amount of education credits (Hope and Lifetime Learning Tax Credits) you received in 2014, from:

- IRS Form 1040, line 49, or
- IRS Form 1040A, line 31.

Taxable Income Exclusion - 2014 (Ref. 33v):*

Enter the following amounts received in 2014, ONLY IF THEY WERE INCLUDED in any of the above entries, such as Adjusted Gross Income, Earned Income or Other Taxable Income:

- Taxable Educational Financial Aid received in 2014 (may include earnings from Federal Work-Study, teaching/research assistantships, or other need-based work programs, and grant and scholarship aid in excess of tuition, fees, books and supplies)
- AmeriCorps awards (allowances and benefits)
- Earnings from work under a cooperative education program offered by a college

The above can be found on the Form 1040 or 1040A with an SCH annotation on line 7, or listed under Other Income on the Form 1040, line 21.

- Combat pay or special combat pay received (from W-2, box 12, Code Q)

Unemployment Benefits Received in 2014 - Parent 1 (Ref. CST233):*

If Parent 1 is unemployed, enter the amount of unemployment benefits received during 2014. Include any severance payments that may also have been received.

Unemployment Benefits Received in 2014 - Parent 2 (Ref. CST234):*

If Parent 2 is unemployed, enter the amount of unemployment benefits received during 2014. Include any severance payments that may also have been received.

Tax Exempt Interest Income - 2014 (Ref. CST235):*

Enter the amount of tax-exempt interest income received by parents from:

- 2014 IRS Form 1040, line 8b, or
- 2014 IRS Form 1040A, line 8b.

Untaxed IRA Distributions - 2014 (Ref. CST238):*

Enter the total amount of untaxed portions of IRA distributions from:

- 2014 IRS Form 1040, lines (15a minus 15b), or
- 2014 IRS Form 1040A, lines (11a minus 11b).

Untaxed Pension Distribution - 2014 (Ref. CST239):*

Enter the total amount of untaxed portions of pensions from:

- 2014 IRS Form 1040, lines (16a minus 16b), or
- 2014 IRS Form 1040A, lines (12a minus 12b).

Exclude rollovers.

Other Untaxed Income/Benefits Breakdown (33p) - Tax Deferred Plan Payments - 2014 (Ref. CST240):*

Enter the total amount of payments to tax-deferred pension and savings plans (paid directly or withheld from earnings). Include amounts reported on Form W-2 in Boxes 12a through 12d, codes D, E, F, G, H and S. Include untaxed payments to 401 (k) and 403 (b) plans.

IRA/KEOGH/SEP/SIMPLE Payments - 2014 (Ref. CST241):*

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from:

- 2014 IRS Form 1040, lines (28 + 32), or
- 2014 IRS Form 1040A, line 17.

Living and Housing Allowance/BAS - 2014 (Ref. CST242):*

Enter the total amount of housing, food and other living allowances paid to members of the military, clergy and others, including cash payments and cash value of benefits received in 2014. For members of the military only include basic allowance for subsistence (BAS). Do not include the value of on- or off-base military housing or the value of a basic military allowance for housing (BAH). Living and housing allowance may be reported on the Form W-2.

Military Housing Allowance (BAH)-2014 (Ref. CST243):*

Enter the total value of on- or off-base military housing or the value of basic military allowance for housing (BAH) received in 2014.

Veteran Non-Education Benefits - 2014 (Ref. CST244):*

Enter the total amount of veterans' non-educational benefits, such as Death Pension, Disability, Dependency & Indemnity Compensation (DIC), etc. received in 2014.

Remaining Untaxed Income and Benefits - 2014 (Ref. CST245):*

Enter the total amount of any other untaxed income your parents received in 2014 that is not already reported anywhere on this application such as workers' compensation, disability, Black Lung Benefits, Refugee Assistance, untaxed portions for Railroad retirement benefits, etc. Do not include untaxed combat pay reported on the Form W-2.

Adjustments to Income (Ref. CST246):*

Enter to the amount of 2014 total adjustments to income from:

- 2014 IRS Form 1040 line 36
- 2014 IRS Form 1040A line 20, or
- 2014 IRS Form 1040NR line 35

Business or Farm Income- 2014 (Ref. CST247):*

Enter the parent's net income from IRS Form 1040 lines 12, 17, 18. Use a minus (-) sign to indicate a loss.

Other Positive Taxable Income- 2014 (Ref. CST248):*

Enter the parent's net income from IRS Form 1040, lines 10, 11, 13, 14, 15b, 16b, 19, 20b and 21 Use a minus (-) sign to indicate a loss.

Untaxed Social Security Benefits for Student - 2014 (Ref. CST249):*

Enter the amount of untaxed social security benefits (including Supplemental Security Income) specifically for the student. Do not include any benefits included under "Adjusted Gross Income-2014" from above. Enter the total for the year, not the monthly amounts.

Untaxed Social Security Benefits End Date (Ref. CST250):

Enter the date when any untaxed social security benefits are scheduled to end for the student.

Taxable Grants/Scholarships - 2014 (Ref. CST251):*

Enter the amount of taxable Educational Financial Aid received in 2014 (may include earnings from Federal Work-Study, teaching/research assistantships, other need-based work programs, and grant and scholarship aid in excess of tuition, fees, books and supplies.). This can be found from:

- IRS Form 1040, line 7 with 'SCH' annotation, or
- IRS Form 1040A, line 7 with 'SCH' annotation.

Americorp - 2014 (Ref. CST252):*

Enter the amount of AmeriCorps awards (allowances and benefits) reported on IRS Form 1040, line 21, received in 2014.

Taxable Combat Pay - 2014 (Ref. CST253):*

Enter the amount of taxable combat pay or special combat pay that was included in your parent's adjusted gross income on their 2014 Form 1040 or 1040A because your parent(s) are commissioned officers. Do not include the amount listed in box 12, code Q, of your Form W-2 as that represents the non-taxable portion of combat pay. This does not apply to commissioned warrant officers.

Co-Op Earnings - 2014 (Ref. CST254):*

Enter the amount of earnings from work under a cooperative education program offered by a college received in 2014.

Foreign Income Exclusion - 2014 (Ref. CST255):*

Enter the amount of foreign income exclusion reported on the 2014 IRS Form 2555, line 45, or Form 2555EZ, line 18.

Tuition and Fees Deduction - 2014 (Ref. CST256):*

Enter the amount of the tuition and fees deduction from:

- IRS Form 1040, line 34, or
- IRS Form 1040A, line 19.

Additional Child Tax Credit - 2014 (Ref. CST257):*

Enter the amount of the Additional Child Tax Credit claimed on:

- 2014 IRS form 1040, line 65
- 2014 IRS Form 1040A, line 39, or
- 2014 IRS Form 1040NR- line 63.

Fuel Tax Credit - 2014 (Ref. CST258):*

Enter the amount of the Fuel Tax Credit from IRS form 1040, line 70.

FSA Medical and Dependent Care (Ref. CST259):*

Enter the total amount withheld from wages in 2014 to contribute to a flexible spending account (FSA) for medical or dependent care expenses.

Additional Medicare Tax - 2014 (Ref. CST260):*

Enter the Additional Medicare Tax amount your parents paid from their 2014 IRS Form 1040, line 60, box (a). If box (a) is not checked, indicating that a 2014 Form 8959 was not filed, enter 0.

Cash Support Received (Ref. CST261):*

Enter the amount of cash your parents received and any money paid on their behalf (e.g., bills, rent, etc.) in 2014. (Don't include child support or any other amounts reported elsewhere on this application.)

Personal Loans (Ref. CST262):*

Please indicate any personal loans your parents may have received from family, relatives, friends, business, etc. Enter 0 if none. Do not include loans received from a home equity line of credit, Federal Student aid loans or any personal bank loans.

Personal Loan Documentation (Ref. CST263):

Do you have documentation for these loans such as a promissory note or repayment schedule? If your parents do not have an undocumented personal loan, leave this question blank.

1. Yes
2. No

Source of Cash Support (Ref. CST275):

Enter the source of the cash support listed in CST261. If the cash support was provided by an individual, enter the relationship of that individual to the parent. If it was provided by an organization, enter the name of the organization. If no cash support was listed, skip this question.

Source of Personal Loan (Ref. CST276):

Enter the source of the personal loan listed in CST262. If the loan was provided by an individual, enter the relationship of that individual to the parent. If it was provided by an organization, enter the name of the organization. If no personal loan was listed, skip this question.

Parents' Assets**Cash/Savings/Checking (Ref. 36a):***

Enter the amount of money in cash, savings, and checking accounts as of today.

Home Value (Ref. 36b):*

If the parents own a home, enter the current market value of the home. Do not use assessed, insured, or tax value. A "Home" includes a house, mobile home, condominium, etc. Renters, enter 0.

Home Debt (Ref. 36c):*

If the parents own a home, enter the amount currently owed on the home, including the present mortgage and related debts on the home. Do not include interest due on the mortgage.

Year of Purchase of Home (Ref. 36d):*

If the parents own a home, enter the 4 digits of the year in which the home was purchased.

Purchase Price of Home (Ref. 36e):*

If the parents own a home, enter the original purchase price of the home.

Other Real Estate Value (Ref. 36f):*

Enter the current value of other real estate (including rental property, land, second or summer homes, etc.)

Other Real Estate Debt (Ref. 36g):*

Enter the amount currently owed on the other real estate.

Investments Value (Ref. 36h):*

Enter the current value of parents' investments, including trust funds, certificates of deposit, money market funds, mutual funds, stocks, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, precious metals, etc. Do not include any amount of these investments held in retirement plans, such as pension funds, annuities, IRAs, Keogh accounts, etc.

Investment Debt (Ref. 36i):*

Enter any amount owed on these investments. Do not include any personal or consumer loans, or any debts that are not related to the assets included here. Do not include any education loans.

Business Value (Ref. 36j):*

If you own a business, enter the current value of the business. Include the value of land, buildings, machinery, inventories and equipment. If are not sole owner(s), enter only your share of the business value.

Business Debt (Ref. 36k):*

Enter the amount currently owed on the business. Include only the present mortgage and related debts for which the business is being used as collateral. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the business debt.

Small Family Run Business (Ref. 36ka):*

Is the business which is listed here operated by your family, AND does it have fewer than 100 employees?

1. Yes
2. No

Farm Value (Ref. 36m):*

If you (and spouse) own a farm, enter the current value of the farm. Include the value of land, buildings, machinery, equipment, livestock, inventories, etc. Do not include the value of the home in this question. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the farm value.

Farm Debt (Ref. 36n):*

Enter the amount currently owed on the farm. Include only the present mortgage and related debts for which the farm is being used as collateral. If you (and spouse) are not sole owner(s), enter only your (and spouse's) share of the farm debt.

Family Lives on Farm (Ref. 36o):*

Is your family living on the farm?

1. Yes
2. No

Retirement Accounts Value (Ref. 36p):*

Enter the current value of parents' retirement accounts, including IRA accounts, Keogh accounts, and employer based tax-deferred pension and savings plans such as 401(k), 403(b), and 457 plans. Include amounts from both traditional and Roth IRA accounts. Please list the type of retirement plan and the current value for each parent in the Special Circumstances section.

Parent Housing (Ref. CST264):*

Please indicate parents housing status:

1. Own Home
2. Rent
3. Live with others
4. Employer Provided

Parent Asset in Siblings Name(s) (Ref. CST265):*

Enter the total amount parents(s) hold in Section 529 pre-paid tuition or college savings plans or Coverdell education savings accounts established for all children, as of today. Do not include funds in custodial accounts or other savings and investment accounts held in the names of children who are under age 19, and not enrolled in college. Do not include 529 plan funds that are part of, or were funded by, a UGMA or UTMA account.

College Funds - Student and Siblings (Ref. CST266):*

Enter the total value of college savings accounts, such as a Coverdell or 529 account, that are held in the student or student's siblings' names.

College Funds - Student Only (Ref. CST267):*

Enter the total value of college savings accounts, such as a Coverdell or 529 account that are held in the student's name.

Number of Businesses/Corporations/Partnerships (Ref. CST277):*

Enter the number of businesses/corporations/partnerships your parent(s) have ownership in. Select 0 if none.

Business 1 Name (Ref. CST278):

Enter the name of parent's business.

(If none, skip this question.)

Business 1 Tax Return (Ref. CST279):

Select the type of tax return that was or will be used to report the income from this business in 2014. (If you do not own a business, skip this question)

1. Form 1040, Schedule C
2. Form 1040, Schedule C-EZ
3. Form 1065, U.S. Return of Partnership
4. Form 1120, U.S. Corp Income Tax
5. Form 1120S, U.S. Income Tax Return
6. Foreign Tax Return

Business 1 Value (Ref. CST280):

Enter the current total market value of this business. Include the value of land, buildings, machinery, inventories, and equipment. If parent (or spouse) are not sole owner(s), enter only parent (and spouse's) share of the business value. (If parent(s) do not own a business, skip this question.)

Business 1 Debt (Ref. CST281):

Enter the amount currently owed on this business. Include only the present mortgage and related debts for which the business is being used as collateral. If parent (and spouse) are not sole owner(s), enter only parent (and spouse's) share of the business debt. (If parent(s) do not own a business, skip this question.)

Business 1 Number of Full-Time Employees (Ref. CST282):

Does the business employ more than 100 full-time or full-time equivalent employees?

(If parent(s) do not own a business, skip this question.)

1. Yes
2. No

Business 1 Owner (Ref. CST283):

Which parent owns this business?

(If parent(s) do not own a business, skip this question.)

1. Father/Stepfather
2. Mother/Stepmother
3. Both Parents

Business 1 - Mother/Stepmother's Percentage of Ownership (Ref. CST284):

What is your mother/stepmother's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 1 - Father/Stepfather's Percentage of Ownership (Ref. CST285):

What is your father/stepfather's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 1 - Other Family Member's Percent Ownership (Ref. CST286):

Are there other family members with ownership in this business? Family includes (1) persons directly related to the student, such as a parent, sister or cousin, or (2) persons who are or were related to the student by marriage, such as a spouse, stepparent or sister-in-law. If yes, list their names, relationship to you, and percentage of ownership.

(If parent(s) do not own a business, skip this question.)

Business 1 Address (Ref. CST287):

Enter the full address where this business is located.

(If parent(s) do not own a business, skip this question.)

Business 2 Name (Ref. CST288):

Enter the name of parents' business.

(If none, skip this question.)

Business 2 Tax Return (Ref. CST289):

Select the type of tax return that was or will be used to report the income from this business in 2014.

(If you do not own a business, skip this question.)

1. Form 1040, Schedule C
2. Form 1040, Schedule C-EZ
3. Form 1065, U.S. Return of Partnership
4. Form 1120, U.S. Corp Income Tax
5. Form 1120S, U.S. Income Tax Return
6. Foreign Tax Return

Business 2 Value (Ref. CST290):

Enter the current total market value of this business. Include the value of land, buildings, machinery, inventories, and equipment. If parent (or spouse) are not sole owner(s), enter only parent (and spouse's) share of the business value.

(If parent(s) do not own a business, skip this question.)

Business 2 Debt (Ref. CST291):

Enter the amount currently owed on this business. Include only the present mortgage and related debts for which the business is being used as collateral. If parent (and spouse) are not sole owner(s), enter only parent (and spouse's) share of the business debt.

(If parent(s) do not own a business, skip this question.)

Business 2 Number of Full-Time Employees (Ref. CST292):

Does the business employ more than 100 full-time or full-time equivalent employees?

(If parent(s) do not own a business, skip this question.)

1. Yes
2. No

Business 2 Owner (Ref. CST293):

Which parent owns this business?

(If parent(s) do not own a business, skip this question.)

1. Father/Stepfather
2. Mother/Stepmother
3. Both Parents

Business 2 - Mother/Stepmother's Percentage of Ownership (Ref. CST294):

What is your mother/stepmother's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 2 - Father/Stepfather's Percentage of Ownership (Ref. CST295):

What is your father/stepfather's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 2 - Other Family Member's Percent Ownership (Ref. CST296):

Are there other family members with ownership in this business? Family includes (1) persons directly related to the student, such as a parent, sister or cousin, or (2) persons who are or were related to the student by marriage, such as a spouse, stepparent or sister-in-law. If yes, list their names, relationship to you, and percentage of ownership.

(If parent(s) do not own a business, skip this question.)

Business 2 Address (Ref. CST297):

Enter the full address where this business is located.

(If parent(s) do not own a business, skip this question.)

Business 3 Name (Ref. CST298):

Enter the name of parent's business.

(If none, skip this question.)

Business 3 Tax Return (Ref. CST299):

Select the type of tax return that was or will be used to report the income from this business in 2014.

(If you do not own a business, skip this question.)

1. Form 1040, Schedule C
2. Form 1040, Schedule C-EZ
3. Form 1065, U.S. Return of Partnership
4. Form 1120, U.S. Corp Income Tax
5. Form 1120S, U.S. Income Tax Return
6. Foreign Tax Return

Business 3 Value (Ref. CST300):

Enter the current total market value of this business. Include the value of land, buildings, machinery, inventories, and equipment. If parent (or spouse) are not sole owner(s), enter only parent (and spouse's) share of the business value.

(If parent(s) do not own a business, skip this question.)

Business 3 Debt (Ref. CST301):

Enter the amount currently owed on this business. Include only the present mortgage and related debts for which the business is being used as collateral. If parent (and spouse) are not sole owner(s), enter only parent (and spouse's) share of the business debt.

(If parent(s) do not own a business, skip this question.)

Business 3 Number of Full-Time Employees (Ref. CST302):

Does the business employ more than 100 full-time or full-time equivalent employees?

(If parent(s) do not own a business, skip this question.)

1. Yes
2. No

Business 3 Owner (Ref. CST303):

Which parent owns this business?

(If parent(s) do not own a business, skip this question.)

1. Father/Stepfather
2. Mother/Stepmother
3. Both Parents

Business 3 - Mother/Stepmother's Percentage of Ownership (Ref. CST304):

What is your mother/stepmother's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 3 - Father/Stepfather's Percentage of Ownership (Ref. CST305):

What is your father/stepfather's percentage of ownership?

(If parent(s) do not own a business, skip this question.)

Business 3 - Other Family Member's Percent Ownership (Ref. CST306):

Are there other family members with ownership in this business? Family includes (1) persons directly related to the student, such as a parent, sister or cousin, or (2) persons who are or were related to the student by marriage, such as a spouse, stepparent or sister-in-law. If yes, list their names, relationship to you, and percentage of ownership.

(If parent(s) do not own a business, skip this question.)

Business 3 Address (Ref. CST307):

Enter the full address where this business is located.

(If parent(s) do not own a 3rd business, skip this question.)

Additional Businesses (Ref. CST308):

If parent owns or has partial ownership of more than three businesses, enter the business name, tax return type, number of full-time employees, total ownership percentage, business value, business debt and address for each business in this field. Use the special circumstances section if more space is needed.

(If parent(s) do not own a business, skip this question.)

Parents' Household Expenses

Home Monthly Rent/Mortgage (Ref. 39a):*

Enter the amount of the parents' current monthly rent or mortgage payment.

2014 State and Local Taxes (Ref. 39b):*

Enter the total amount of state and local income, property, real estate, and personal property taxes paid during 2014. For non-U.S. residents, include all local taxes, such as those levied by a state, province, or municipality.

Own or Lease a Vehicle (Ref. 39c):*

Do the parents own and/or lease a vehicle?

1. Own
2. Lease
3. Own and Lease
4. None

Vehicle 1 - Model Year (Ref. 39d):*

Enter the 4 digits of the model year of the vehicle.

Vehicle 1 - Make (Ref. 39e):*

Enter the vehicle make, such as Honda or Ford.

Vehicle 1 - Model (Ref. 39f):*

Enter the vehicle model, such as Accord or Explorer.

Vehicle 2 - Model Year (Ref. 39g):

Enter the 4 digits of the model year of the vehicle.

Vehicle 2 - Make (Ref. 39h):*

Enter the vehicle make, such as Honda or Ford.

Vehicle 2 - Model (Ref. 39i):*

Enter the vehicle model, such as Accord or Explorer.

Total Vehicle Indebtedness (Ref. 39j):*

Enter the total vehicle indebtedness as of December 31, 2014.

Total Monthly Vehicle Payments (Ref. 39k):*

Enter the current total monthly vehicle payments due on loans or leases made for the purchase of the vehicle(s).

Parents' Household Members

Parent 1 Information (Ref. 41)

College Student (Ref. 41d)

Will this household member be going to college at least half time during the 2015-2016 academic year?

1. Yes
2. No

School/College/Institution – 2015-2016 (Ref. 41e)

Enter the name of the educational institution the household member will attend in 2015-2016. Leave this item blank if uncertain about the institution to be attended.

Class – 2015-2016 (Ref. 41f)

List the year-in-school or grade of the household member for the 2015-2016 academic year.

Tuition and Fees for 2015-2016 (Ref. 41n)

Enter the education expenses, including tuition, fees, and room and board for the household member in 2015-2016.

Parent 2 Information (Ref. 42)**College Student (Ref. 42d)**

Will this household member be going to college at least half time during the 2015-2016 academic year?

1. Yes
2. No

School/College/Institution – 2015-2016 (Ref. 42e)

Enter the name of the educational institution the household member will attend in 2015-2016. Leave this item blank if uncertain about the institution to be attended.

Class – 2015-2016 (Ref. 42f)

List the year-in-school or grade of the household member for the 2015-2016 academic year.

Tuition and Fees for 2015-2016 (Ref. 42n)

Enter the education expenses, including tuition, fees, and room and board for the household member in 2015-2016.

Parents' Other Household Members**Parents' Other Household Member 1 (Ref. 43)**

Give information for up to 6 family members that the parent(s) financially supports. The number of family members that we ask about is based on the answer to question 32s. Do not give information for the student and the parent(s).

Name (Ref. 43a):*

Enter the name of a member of the parents' household (not including the student applicant or parents).

Age (Ref. 43b):*

Enter the age of the household member as of today.

Relationship to Student (Ref. 43c):*

Select the entry which best describes the household member's relationship to the student.

1. Student's parent/stepparent,
2. Student's brother/sister,
3. Student's spouse,
4. Student's son/daughter,
5. Student's grandparent,
6. Other

College Student (Ref. 43d):*

Will the household member be going to college at least half time during the 2015-2016 academic year?

1. Yes
2. No

School/College/Institution – 2015-2016 (Ref. 43e):*

Enter the name of the educational institution the household member will attend in 2015-2016. Enter undecided if uncertain about the institution to be attended.

Class – 2015-2016 (Ref. 43f):*

List the year-in-school or grade of the household member for the 2015-2016 academic year.

Assistance from Parents – 2015-2016 (Ref. 43g):*

Enter the amount of education financial assistance to be received by the household member from the parents in 2015-2016.

School/College/Institution – 2014-2015 (Ref. 43h):*

Enter the name of the educational institution the household member attended in 2014-2015. If the household member did not attend an educational institution, enter not enrolled.

Assistance from Parents – Last Year in School (Ref. 43m):*

Enter the amount of any education financial assistance received by the household member from the parents for the most recent year that the household member attended college. Please respond to this item even if several years have passed since the household member attended college.

Class Level/Year-in-School in 2015-2016 (Ref CST336):*

What is the household member's level/year-in-school for the 2015 – 2016 academic year?

1. Kindergarten to 8th grade
2. 9th grade
3. 10th grade
4. 11th grade
5. 12th grade
6. 1st yr undergrad
7. 2nd yr undergrad
8. 3rd yr undergrad
9. 4th yr undergrad
10. 5th yr and beyond undergrad
11. 1st yr grad/prof
12. 2nd yr grad/prof
13. 3rd yr grad/prof
14. 4th yr and beyond grad/prof
15. Other
16. None

Attend College At Least One Term in 2015-2016 (Ref. CST337):*

Indicate whether the household member will attend college at least one term in 2015 – 2016.

1. Yes, full-time
2. Yes, half-time
3. Yes, less than half-time
4. No

Tuition and Fees for 2015-2016 (Ref. CST338):*

Enter the amount of tuition and fees for the household member in 2015 – 2016. Do not include room and board or other personal/miscellaneous expenses for 2015 – 2016. Enter 0 if no tuition will be paid for this household member for 2015 – 2016.

College Type – 2015-2016 (Ref. CST339):

If the household member will be attending college in 2015 – 2016, indicate the type of college this person will attend. If the household member will attend the University of Southern California, enter the household member's 10-digit USCID number (if known) in the special circumstances section.

1. 2-year public college/univ
2. 2-year private college/univ
3. 4-year California Stat Univ
4. 4-year Univ of California
5. Other 4-yr public college/uni
6. Univ of Southern California i
7. Other 4-yr private college/un
8. Grad/post-grad/professional
9. Proprietary school

For each additional household member, follow the instructions provided for items 43a through 43m. This applies to questions for household members 2 through 6, with question numbers 44a through CST359.

Non-Custodial Parent's Contribution for 2015-2016 (Ref. CST335):*

Enter the amount the non-custodial parent expects to provide for the student's educational costs for the 2015 – 2016 academic year.

Parents' Special Circumstances (Ref. 59)

This section is not required of you to complete. Enter any special circumstance that you wish the school(s) to consider in their assessment of this application. If you do choose to add an explanation of your special circumstance, the financial aid administrator at the schools to which the application is being submitted may take your explanation into consideration.