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2024-2025 Legal Guardian Paper Profile

Students who have legal guardians or someone other than their biological parents who support them should complete this form.

STUDENT INFORMATION						
Student Name						
Student Email Address						
Student Banner ID						
Legal Guardian(s)* Names <i>*If legal guardian is remarried, include spouse</i>						
Legal Guardian(s) emails						
Student Home Address						
Phone Number						
FAMILY INFORMATION						<i>Complete the grid below and include the following people in your legal guardians' household.</i>
<ul style="list-style-type: none"> You Your Legal Guardian(s) <ul style="list-style-type: none"> ✓ Include spouse, if legal guardian(s) is married Your Siblings & Your Legal Guardian's Other Children <ul style="list-style-type: none"> ✓ Include your siblings and other children if your legal guardians will provide more than half of their support from 7/1/2024 through 6/30/2025 even if they do not live with your legal guardian(s). Other People <ul style="list-style-type: none"> ✓ Include other people (i.e. grandparents, cousins) if they now live with your legal guardians and they provide more than half of their support and will continue to provide more than half of their support through 6/30/2025. 						
FULL NAME	AGE	RELATION TO STUDENT	COLLEGE ATTENDING IN 2024-2025	UNDERGRAD OR GRADUATE?	ENROLLED AT LEAST HALF-TIME?	YEAR IN SCHOOL (FR, SOPH, JR, SR)

PERSONAL TAX INFORMATION (2022)*Check only ONE circle each under the legal guardian & student section.***Legal Guardian(s) Tax Filing Status**

- Legal Guardian(s) 2022 Federal Tax returns are attached
 ✓ Include all schedules filed with return
 ✓ Include all W2(s) filed with return
- Legal Guardian(s) were not required to file taxes in 2022
 ✓ I have completed the income grid below
- Legal Guardian(s) 2022 Federal tax return are on extension
 ✓ The Legal Guardian Income grid below is complete
 ✓ I have attached a copy of the extension
 ✓ Extension granted to: _____

Student Tax Filing Status

- 2022 Federal Tax returns are attached for student
 ✓ Include all schedules filed with return
 ✓ Include all W2(s) filed with return
- Student was not required to file taxes in 2022
 ✓ I have completed the income grid below
- 2022 Student Federal Tax return are on extension
 ✓ I have completed the Student Income grid below
 ✓ I have attached a copy of the extension
 ✓ Extension granted to: _____

ESTIMATED INCOME GRID (2022)*Complete this section **ONLY** if your 2022 personal tax returns are on extension **OR** you were not required to file. Do not leave any field blank. Use \$0 or N/A, as appropriate.***TAXABLE INCOME**

January 1, 2022 - December 31, 2022

	LEGAL GUARDIAN(S)	STUDENT
Legal Guardian 1 wages (gross amount)		X
Legal Guardian 2 wages (gross amount)		X
Student wages (gross amount)	X	
Interest/dividend income (from Schedule B)		
Net income/loss from business (Schedule C, E, or F)		
Severance pay		
Capital gain/loss (from Schedule D)		
Rental income/loss (from Schedule E)		
Taxable portions of Social Security		
Taxable portions of pension/annuity withdrawals		
Income from royalties, partnerships, corporations, estates, trusts		
Alimony received		
Unemployment compensation		
Other taxable income: _____		

UNTAXABLE INCOME*Complete this section regardless of tax filing status. Do not leave any field blank. Use \$0 or N/A, as appropriate*

	January 1, 2022 - December 31, 2022	
	LEGAL GUARDIAN(S)	STUDENT
Untaxed portion of Social Security		
Untaxed portion of pension/annuity withdrawal		
Welfare benefits (i.e. AFDC, TANF, SNAP)		
Voluntary contributions to retirement plans (i.e. 401k, 403b)		
Veteran's benefits		
Housing allowance (subsidized, military, clergy)		

**BUSINESS TAX INFORMATION
(2022)**

If more than three businesses, use a separate piece of paper and provide the info outlined in the grid below for each additional business

Check all that apply...

- Legal Guardian(s) do not own, or have a percentage of interest in, a business
- Legal Guardian(s) filed a Schedule C and/or F as part of their personal 2022 Federal tax returns
 - ✓ I have attached a copy of the Schedule C and/or F
 - ✓ I have answered the questions in the grid below for each business
- Legal Guardian(s) filed a 1065, 1120s and/or 1120 (in 2022)
 - ✓ I have attached a copy of the 1065, 1120s and/or 1120 (including K-1 statements & Schedule L)
 - ✓ I have completed the questions in the grid below for each business
- Legal Guardian (s) business tax returns are on extension
 - ✓ I have attached a copy of the extension granted to: _____
 - ✓ Attached are my most recent business tax return available

BUSINESS TAX GRID (2022)

Do not leave any field blank. Use \$0 or N/A, as appropriate. If unsure about business ownership, check Schedule 1 of your 2022 personal tax return and/or Schedule C and E.

	Business 1	Business 2	Business 3
Name of business:			
Type of Business Tax Return filed: (Schedule C, Schedule C-EZ, Schedule F 1065, 1120 or 1120S)			
Name of Legal Guardian (s) who own business			
Legal Guardian (s) percentage of ownership:			
Current business value (guardian %):			
Current business debt (guardian %):			

PRIMARY HOME INFORMATION

If no home is owned, check here

Address of primary residence (include city/state)	
Current fair market value of primary residence	\$
Current debt on primary residence	
Year primary residence was purchased	
Original purchase price on primary residence	
Do you rent out any portion of your home?	\$
If yes, what percentage is rented out?	

**OTHER REAL ESTATE INFORMATION
(other than primary home)**

If more than three properties, use a separate piece of paper and provide the information outlined in the grid below for each additional property

	Property 1	Property 2	Property 3
Address of other real estate ✓ Provide city & state ✓ If rental, provide Schedule E from personal Federal 2022 tax return			
Current fair market of real estate			
Current debt of real estate			
Is this property part of a business?			

If yes, provide name of business <input checked="" type="checkbox"/> Include business tax return property is a part of			
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ASSET INFORMATION	<i>The following answers should be true as of the date you complete this form.</i>
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	LEGAL GUARDIAN(S)	STUDENT
Cash, checking and savings account balance		
Value of non-retirement investments*		

**Investments include trust funds, money market accounts, mutual funds, certificates of deposit, options, bonds, stock and stock securities, education IRAs, Coverdell savings accounts, child support received, the refund value of 529 state prepaid tuition plans (all children), installment and land sale contracts, commodities, etc.) Do not include the value of qualified retirement accounts.*

529 Plan Information	<i>The value of the 529 Plan is considered a guardian asset. Please complete the following information regarding your 529 Plan (if applicable)</i>
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What is the total value of the 529 in this student/applicant's name?	
What is the total value of the 529 in their siblings' names?	

CERTIFICATION & SIGNATURE	<i>This signature must be a handwritten signature in order for this form to be accepted.</i>
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I, the above named student/legal guardian, certify that the information provided is correct and complete to the best of my knowledge.

Student or Legal Guardian Signature: _____ Date: _____

COMMENTS/SPECIAL CIRCUMSTANCES

Please write on separate piece of paper any details you would like the Office of Financial Aid to be aware of and/or consider.