



THEME: **PLANNING FOR NEXT YEAR (Life after High School)**

OBJECTIVE:

- Help students review the status of their postsecondary applications.
- Review students' work on the HS & Beyond Plan checklist from 11<sup>th</sup> grade.
- Help students update their checklists to prepare them to finalize the plan this year.

**DUE THIS SESSION:**

- 4a-Financial Plan Worksheet
- 4b-Career Exploration Reflection Worksheet

ESSENTIAL QUESTIONS:

- What will I do after high school?
- How can I plan?

CLASSROOM ACTIVITIES:

Tasks	Expanded Activity Information	HANDOUTS
<input type="checkbox"/> Activity #1 <b>Continue organizing portfolios.</b> <i>5-10 minutes</i>	Students will be using their portfolios as the basis for their Senior Presentations/Culminating Projects. It is important that students have well-organized and complete portfolios that reflect their growth and development during high school. <ul style="list-style-type: none"> <li>- Give students time to review their portfolios and begin to organize the contents.</li> </ul>	
<input type="checkbox"/> Activity #2 <b>Financial AID</b> <i>5 minutes</i>	Students who are looking to attend college may need financial aid and this will require submitting the FAFSA. This form must now be filled out on-line and our counseling office is available for students who need assistance. <ul style="list-style-type: none"> <li>- Walk the students through the Financial Aid Information Packet</li> </ul>	<b>5a:</b> Financial Aid Information & FAFSA Worksheet Packet
<input type="checkbox"/> Activity #3 <b>Update HS &amp; Beyond Checklist.</b> <i>10 minutes</i>	Have students update <b>Grade 12 HS &amp; Beyond Plan Checklist</b> with the tasks they have completed to date (this year's checklist includes some updated items focused on seniors). <ul style="list-style-type: none"> <li>- Make sure students focus on the steps they still need to complete to be ready for life after graduation.</li> <li>- Remind students that they will be finishing their Plans by turning these checklists into essays over the next several few weeks.</li> </ul>	<b>5b:</b> High School and Beyond Checklist
<input type="checkbox"/> Homework	<b>DUE NEXT SESSION</b> (if students didn't finish handout in class): <ul style="list-style-type: none"> <li>• Completed High School and Beyond for Grade 12 Worksheet</li> </ul>	



## BEGINNING THE FINANCIAL AID APPLICATION

The first thing you need to do is go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

This website contains all the information you will need to submit your application for Federal Financial Aid. Simply follow the three steps shown on the website:

1. Before beginning the FAFSA
2. Filling out a FAFSA
3. FAFSA Follow-Up

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Listed below is the deadline information for the FAFSA

**The 2009-2010 School Year (July 1<sup>st</sup>, 2009 - June 30<sup>th</sup>, 2010):**

- **FAFSA on the Web** applications must be submitted by **midnight Central Daylight time, June 30, 2010.**
- **Corrections on the Web** forms must be submitted by **midnight Central Daylight time, September 15, 2010.**
- Note: Your school must have your complete and correct information by your last day of enrollment in the 2009-2010 school year.

**Pay close attention to deadlines! Ask your school about their definition of an application deadline - whether it is the *receipt date and time* or the *process date and time* of the application.**

Federal Student Aid considers a FAFSA's *receipt date and time* to be when the FAFSA/correction is submitted successfully.

TIP: When you submit your FAFSA, be sure to print out the confirmation page and keep it for your records. It contains a confirmation number with the exact date and time (Central Standard Time) the form was received.

**Note: Transactions must be completed and accepted by midnight to meet the deadline. If you wait too long to submit your application and it is rejected, you may miss your school's deadline.**

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The best advice on filling out the FAFSA is to:

1. Start Early
2. Gather the information needed ahead of time
3. Be accurate

Take a look at the following FAFSA online worksheet. Use this to start the process and to see exactly what information is needed.

## DO NOT MAIL THIS WORKSHEET.

You must complete and submit a *Free Application for Federal Student Aid* (FAFSA) to apply for federal student aid and to apply for most state and college aid. Applying online with *FAFSA on the Web* at [www.fafsa.ed.gov](http://www.fafsa.ed.gov) is faster and easier than using a paper FAFSA.

For state or college aid, the deadline may be as early as January 2009. See the table to the right for state deadlines. Check with your high school counselor or your college's financial aid administrator about other deadlines.

- **This Worksheet is optional and should only be completed if you plan to use *FAFSA on the Web*.**
- Sections in gray are for parent information.
- In parentheses after each question is the number that is used on *FAFSA on the Web* and the paper FAFSA. However, not all of the questions appear on this worksheet.
- **Submit your FAFSA early, but not before January 1, 2009.**

**Apply Faster—Sign your FAFSA with a Federal Student Aid PIN.**  
If you do not have a PIN, you can apply for one at [www.pin.ed.gov](http://www.pin.ed.gov). Your PIN allows you to electronically sign when you submit your FAFSA. If you are providing parent information, one parent must also sign your FAFSA. To sign electronically, your parent should also apply for a PIN.

### You will need the following information to complete this Worksheet:

- Your Social Security Number and your parents' Social Security Numbers if you are providing parental information.
- Your driver's license number if you have one.
- Your Alien Registration Number if you are not a U.S. citizen.
- 2008 federal tax information or tax returns (including IRS W-2 information) for yourself (and spouse if you are married) and for your parents if you are providing parental information. If you have not yet filed a 2008 income tax return, you can still submit your FAFSA but you must provide income and tax information.
- Information on savings, investments, and business and farm assets for yourself and your parents if you are providing parental information.

#### WARNING!

Be wary of organizations that charge a fee to submit your application or to find you money for college. In general, the help you pay for can be obtained for free from your college or from Federal Student Aid.

#### NOTE:

If you or your family have unusual circumstances (such as loss of employment), complete *FAFSA on the Web* to the extent you can, then submit the application and consult the financial aid office at the college you plan to attend.

### STATE AID DEADLINES

#### Check with your financial aid administrator for these states and territories:

AL, \*AS, CO, \*FM, GA, \*GU, \*HI, \*MH, \*MP, NC, NE, \*NM, \*NV, OR, PR, \*PW, \*SD, \*TX, UT, \*VA, \*VI, \*VT, WA, WI and \*WY.

AK	April 15, 2009 ( <i>date received</i> )
AR	Academic Challenge - June 1, 2009 Workforce Grant - Contact your financial aid administrator Higher Education Opportunity Grant - June 1, 2009 (fall term) - November 1, 2009 (spring term) ( <i>date received</i> )
AZ	March 1, 2009 ( <i>date received</i> )
*CA	Initial awards - March 2, 2009 Additional community college awards - September 2, 2009 ( <i>date postmarked</i> )
#*CT	February 15, 2009 ( <i>date received</i> )
*DC	June 30, 2009 ( <i>date received by state</i> )
DE	April 15, 2009 ( <i>date received</i> )
FL	May 15, 2009 ( <i>date processed</i> )
IA	July 1, 2009 ( <i>date received</i> )
#*ID	Opportunity Grant - March 1, 2009 ( <i>date received</i> )
#IL	First-time applicants - September 30, 2009 Continuing applicants - August 15, 2009 ( <i>date received</i> )
IN	March 10, 2009 ( <i>date received</i> )
#*KS	April 1, 2009 ( <i>date received</i> )
#KY	March 15, 2009 ( <i>date received</i> )
LA	July 1, 2009 ( <i>date received</i> )
#MA	May 1, 2009 ( <i>date received</i> )
MD	March 1, 2009 ( <i>date received</i> )
ME	May 1, 2009 ( <i>date received</i> )
MI	March 1, 2009 ( <i>date received</i> )
MN	30 days after term starts ( <i>date received</i> )
MO	April 1, 2009 ( <i>date received</i> )
#MS	MTAG and MESH Grants - September 15, 2009 HELP Scholarship - March 31, 2009 ( <i>date processed</i> )
#MT	March 1, 2009 ( <i>date received</i> )
ND	March 15, 2009 ( <i>date received</i> )
NH	May 1, 2009 ( <i>date received</i> )
NJ	June 1, 2009, if you received a Tuition Aid Grant in 2008 -2009 All other applicants - October 1, 2009, fall & spring terms - March 1, 2010, spring term only ( <i>date received</i> )
*NY	May 1, 2010 ( <i>date received</i> )
OH	October 1, 2009 ( <i>date received</i> )
#OK	April 15, 2009 ( <i>date received</i> ) for best consideration
*PA	All 2008 - 2009 State Grant recipients & all non-2008 - 2009 State Grant recipients in degree programs - May 1, 2009 All other applicants - August 1, 2009 ( <i>date received</i> )
#RI	March 1, 2009 ( <i>date received</i> )
SC	Tuition Grants - June 30, 2009 ( <i>date received</i> )
#TN	State Grant - March 1, 2009 State Lottery - September 1, 2009 ( <i>date received</i> )
#*WV	March 1, 2009 ( <i>date received</i> )

# For priority consideration, submit application by date specified.

\* Additional form may be required.

## SECTION 1 – STUDENT INFORMATION

Questions are ordered as they appear on *FAFSA on the Web*, but after you are online you may be able to skip some questions based on your answers to earlier questions.

**Your last name (Q1)**

**Your Social Security Number (Q8)**

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**Your driver's license number (optional) (Q11)**

**Are you a U.S. citizen? (Q14)**

If you are neither a citizen nor an eligible noncitizen, you are not eligible for federal student aid. However, you should still complete the application, because you may be eligible for state or college aid.

If you are in the U.S. on an F1 or F2 student visa, or a J1 or J2 exchange visitor visa, or a G series visa (pertaining to international organizations), you must answer "Neither citizen nor eligible noncitizen."

- U.S. citizen (U.S. national)
- Eligible noncitizen Generally, you are an eligible noncitizen if you are:
- A permanent U.S. resident with a Permanent Resident Card (I-551);
  - A conditional permanent resident (I-551C); or
  - The holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any of the following designations: "Refugee," "Asylum Granted," "Parolee" (I-94 confirms paroled for a minimum of one year and status has not expired), "Victim of human trafficking," T-Visa holder (T-1, T-2, T-3, etc.) or "Cuban-Haitian Entrant."
- Neither citizen nor eligible noncitizen

**Your Alien Registration Number (Q15)**

If you are an eligible noncitizen, enter your eight- or nine-digit Alien Registration Number.

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**What is your marital status as of today? (Q16)**

"As of today" refers to the day that you sign your FAFSA.

- Single, divorced or widowed
- Married or remarried     Separated

**Month and year you were married, separated, divorced or widowed (Q17)**

(Example: Month and year: 05/1998)

M	M	Y	Y	Y	Y
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**What is your state of legal residence? (Q18)**

**Enter the date you became a legal resident of your state if it was not before January 1, 2004. (Q20)** (Example: Month and year: 05/2005)

M	M	Y	Y	Y	Y
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Most male students must register with Selective Service to get federal aid. If you are male, age 18-25 and **NOT** registered, select "Register me." (Q22)

- Register me

**Have you ever received federal student aid?**

Answer "No" if you have never received federal student grants, federal student loans or federal work-study. You should also answer "No" if you have never attended college. If you answer "No" to this question, skip question 23.

- Yes
- No

**Have you been convicted for the possession or sale of illegal drugs for an offense that occurred while you were receiving federal student aid (grants, loans or work-study)? (Q23)**

Do not count convictions that have been removed from your record or that occurred before you turned age 18, unless you were tried as an adult. If you answer "Yes," you can use an interactive worksheet when completing the FAFSA online. Based on your answers to the worksheet questions, you can determine if the conviction affects your eligibility for federal student aid. If the conviction does affect your eligibility for federal aid, you should still submit your application because you may qualify for state or college aid.

- Yes
- No

**Highest school your father completed (Q24)**

Some states and colleges offer aid based on the level of schooling your parents completed.

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

**Highest school your mother completed (Q25)**

Some states and colleges offer aid based on the level of schooling your parents completed.

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

**When you begin the 2009-2010 school year, what degree or certificate will you be working on? (Q29)**

- |  |  |
|--|--|
| <p><input type="checkbox"/> 1st bachelor's degree</p> <p><input type="checkbox"/> 2nd bachelor's degree</p> <p><input type="checkbox"/> Associate degree (occupational or technical program)</p> <p><input type="checkbox"/> Associate degree (general education or transfer program)</p> <p><input type="checkbox"/> Certificate or diploma (occupational, technical or educational program of less than two years)</p> | <p><input type="checkbox"/> Certificate or diploma (occupational, technical or educational program of two or more years)</p> <p><input type="checkbox"/> Teaching credential (nondegree program)</p> <p><input type="checkbox"/> Graduate or professional degree</p> <p><input type="checkbox"/> Other/undecided</p> |
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## SECTION 1 (CONTINUED) – STUDENT INFORMATION

<p><b>When you begin the 2009-2010 school year, what do you expect your enrollment status to be?</b> (Q30) (Enrollment definitions refer to undergraduate study.)</p>	<input type="checkbox"/> Full-time (at least 12 credit hours in a term or 24 clock hours per week) <input type="checkbox"/> 3/4-time (at least 9 credit hours in a term or 18 clock hours per week) <input type="checkbox"/> Half-time (at least 6 credit hours in a term or 12 clock hours per week) <input type="checkbox"/> Less than half-time (fewer than 6 credit hours in a term or less than 12 clock hours per week) <input type="checkbox"/> Don't know
<p><b>In addition to grants, are you interested in being considered for work-study or student loans?</b> (Q31)</p>	<input type="checkbox"/> Work-study (aid earned through work) <input type="checkbox"/> Neither <input type="checkbox"/> Student loans (which you must pay back) <input type="checkbox"/> Don't know <input type="checkbox"/> Both work-study and student loans

## SECTION 2 – STUDENT DEPENDENCY STATUS

<p><b>Were you born before January 1, 1986?</b> (Q48)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>As of today, are you married?</b> (Q49) <small>(Answer "Yes" if you are separated but not divorced.) "As of today" refers to the day that you sign your FAFSA.</small></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>At the beginning of the 2009-2010 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, graduate certificate, etc.)?</b> (Q50)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?</b> (Q51)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Are you a veteran of the U.S. Armed Forces?</b> (Q52) <small>Answer "Yes" (you are a veteran) if you (1) have engaged in active duty in the U.S. Armed Forces (Army, Navy, Air Force, Marines or Coast Guard) or are a National Guard or Reserve enlistee who was called to active duty for other than state or training purposes, or were a cadet or midshipman at one of the service academies, and (2) were released under a condition other than dishonorable. Also answer "Yes" if you are not a veteran now but will be by June 30, 2010. Answer "No" (you are not a veteran) if you (1) have never engaged in active duty in the U.S. Armed Forces, (2) are currently an ROTC student or a cadet or midshipman at a service academy, (3) are a National Guard or Reserve enlistee activated only for state or training purposes, or (4) were engaged in active duty in the U.S. Armed Forces but released under dishonorable conditions.</small></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Do you have children who will receive more than half of their support from you between July 1, 2009 and June 30, 2010?</b> (Q53)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2010?</b> (Q54)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?</b> (Q55) <small>Answer "Yes" if you had no living parent (biological or adoptive) at any time since you turned age 13, even if you are now adopted. Answer "Yes" if you were in foster care at any time since you turned age 13, even if you are no longer in foster care as of today. Answer "Yes" if you were a dependent or ward of the court at any time since you turned age 13, even if you are no longer a dependent or ward of the court as of today. Note that the financial aid administrator at your school may require you to provide proof that you were in foster care or a dependent or ward of the court.</small></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Use these instructions to answer questions 56-57</b> <small>Answer "Yes" if you can provide a copy of a court's decision that as of today you are an emancipated minor or are in legal guardianship. Also answer "Yes" if you can provide a copy of a court's decision that you were an emancipated minor or were in legal guardianship immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court's decision was issued.</small></p>	
<p><b>Are you or were you an emancipated minor as determined by a court in your state of legal residence?</b> (Q56)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Are you or were you in legal guardianship as determined by a court in your state of legal residence?</b> (Q57).</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>Use these instructions to answer questions 58-60</b> <small>Answer "Yes" if you received a determination at any time on or after July 1, 2008, that you were an unaccompanied youth who was homeless or, for question 60, at risk of being homeless. • "Homeless" means lacking fixed, regular and adequate housing, which includes living in shelters, motels or cars, or temporarily living with other people because you had nowhere else to go. • "Unaccompanied" means you are not living in the physical custody of your parent or guardian. • "Youth" means you are 21 years of age or younger or you are still enrolled in high school as of the day you sign this application.</small></p>	
<p><b>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?</b> (Q58)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>At any time on or after July 1, 2008, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless?</b> (Q59)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p><b>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?</b> (Q60)</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

If you answered "YES" to ANY of the previous questions, you do not have to provide parental information. Skip to Section 4 on page 6.  
 If you answered "NO" to ALL of the previous questions, then you must provide parental information. Complete Section 3 on the next page.

## SECTION 3 – PARENTAL INFORMATION

If you answered “No” to all of the questions in Section 2, you must provide parental information. Refer to your parents’ IRS tax return when necessary. Answer the questions as of the date you will complete and sign your FAFSA.

- Grandparents, foster parents and legal guardians are not considered parents on this form unless they have legally adopted you.
- If your parent is widowed or single, answer the questions about that parent. If your widowed parent is remarried, answer the questions about that parent and your stepparent.
- If your parents are divorced or separated, 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 past 12 months. If this parent is remarried, answer the questions about that parent and your stepparent.

Federal law provides that, under very limited special circumstances, you may submit your FAFSA without parental information. If you have a special circumstance and are unable to provide parental information, *FAFSA on the Web* will instruct you on how to proceed. The following **are examples** of special circumstances.

- Your parents are incarcerated; or
- You have left home due to an abusive family environment; or
- You do not know where your parents are and are unable to contact them (and you have not been adopted).

**What is your parents’ marital status as of today? (Q61)**

“As of today” refers to the day that you sign your FAFSA.

- Married or remarried     Divorced or separated  
 Single     Widowed

**Month and year your parents were married, separated, divorced or widowed.**

(Q62) (Example: Month and year: 05/1998)

M	M	Y	Y	Y	Y
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**What is your parents’ e-mail address? (Q71)**

If you provide your parents’ e-mail address, we will let them know your FAFSA has been processed.

**What is your father’s (or stepfather’s) Social Security Number? (Q63)**

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**What is your father’s (or stepfather’s) last name? (Q64)**

**What is your father’s (or stepfather’s) date of birth? (Q66)**

(Example: Month, day and year: 05/07/1962)

M	M	D	D	Y	Y	Y	Y
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**What is your mother’s (or stepmother’s) Social Security Number? (Q67)**

			-			-			
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**What is your mother’s (or stepmother’s) last name? (Q68)**

**What is your mother’s (or stepmother’s) date of birth? (Q70)**

(Example: Month, day and year: 05/07/1962)

M	M	D	D	Y	Y	Y	Y
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**What is your parents’ state of legal residence? (Q72)**

**Enter the date of legal residency for the parent who has lived in the state the longest, if it was not before January 1, 2004. (Q74)**

(Example: Month and year: 05/2005)

M	M	Y	Y	Y	Y
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**What income tax return did your parents file or will they file for 2008? (Q83)**

- IRS 1040  
 IRS 1040A, 1040EZ

- A foreign tax return  
 A tax return with Puerto Rico, another U.S. territory or a Freely Associated State

**If your parents have filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? (Q84)**

A person is not eligible to file a 1040A or 1040EZ if he or she makes \$100,000 or more, itemizes deductions, receives income from his or her own business or farm, is self-employed, receives alimony or is required to file Schedule D for capital gains. If your parents were not required to file a tax return or they filed a 1040 only to claim Hope or Lifetime Learning tax credits, and would have otherwise been eligible for a 1040A or 1040EZ, answer “Yes.”

- Yes  
 No  
 Don’t know

**In 2007 or 2008, did you, your parents or anyone in your parents’ household receive benefits from any of the federal benefits programs listed? (Q77-81)**

**Mark all the programs that apply.**

Select benefits received for all of your parents’ household members. Include in your parents’ household: (1) your parents and yourself, even if you don’t live with your parents; (2) your parents’ other children if (a) your parents will provide more than half of their support between July 1, 2009, and June 30, 2010, or (b) the children could answer “No” to every question in Section 2 of this worksheet; and (3) other people only if they 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, 2009, and June 30, 2010. TANF may have a different name in your parents’ state. Call 1-800-4-FED-AID to find out the name of the state’s program.

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

## SECTION 3 (CONTINUED) – PARENTAL INFORMATION

### As of today, is either of your parents a dislocated worker? (Q85)

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.

- Yes  
 No  
 Don't know

### What was your parents' adjusted gross income for 2008? (Q86)

Adjusted gross income is on IRS form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

\$

Questions 89 and 90 ask about earnings (wages, salaries, tips, etc.) in 2008.

Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on IRS Form 1040—lines 7 + 12 + 18 + Box 14 of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.

### How much did your father/stepfather earn from working in 2008? (Q89)

\$

### How much did your mother/stepmother earn from working in 2008? (Q90)

\$

### Enter the amount of your parents' income tax for 2008. (Q87)

Income tax amount is on IRS Form 1040—line 56; 1040A—line 35; or 1040EZ—line 11.

\$

### Enter your parents' exemptions for 2008. (Q88)

Exemptions are on IRS Form 1040—line 6d or 1040A—line 6d. On the 1040EZ, if a person checked either the "you" or "spouse" box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$3,500 equals one exemption). If a person didn't check either box on line 5, enter 01 if he or she is single, or 02 if he or she is married.

### Your parents' number of family members in 2009-2010. (Q75)

Include in your parents' household: (1) your parents and yourself, even if you don't live with your parents, (2) your parents' other children if (a) your parents will provide more than half of their support between July 1, 2009, and June 30, 2010, or (b) the children could answer "No" to every question in Section 2 of this worksheet, and (3) other people only if they 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, 2009, and June 30, 2010.

### How many people in your parents' household will be college students between July 1, 2009 and June 30, 2010? (Q76)

Always count yourself. **Do not include your parents.** Include others only if they will attend, at least half-time in 2009-2010, a program that leads to a college degree or certificate.

### Your parents' 2008 Additional Financial Information (Q94) Complete the left column of the table on page 8.

### Your parents' 2008 Untaxed Income (Q95) Complete the left column of the table on page 8.

## Parent Asset Information

### As of today, what is your parents' total current balance of cash, savings and checking accounts? (Q91)

\$

- Investments include real estate (do not include the family home), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, the refund value of 529 prepaid tuition plans, installment and land sale contracts (including mortgages held), commodities, etc. For more information about reporting educational savings plans call 1-800-4-FED-AID. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.
- Do not include the value of life insurance, retirement plans (401[k] plans, pension funds, annuities, noneducation IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported in questions 41 and 91.
- 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.

### As of today, what is the net worth of your parents' investments, including real estate (not your parents' home)? (Q92)

Net worth means current value minus debt.

\$

### As of today, what is the net worth of your parents' current businesses and/or investment farms? (Q93)

**Do not include** the value of a family farm that your parents live on and operate.

**Do not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

\$

## SECTION 4 – STUDENT FINANCES

- Answer the questions as of the date you will complete and sign your FAFSA. Refer to the IRS tax return as needed.
- If you filed a foreign tax return, use the exchange rate at [www.federalreserve.gov/releases/h10/update](http://www.federalreserve.gov/releases/h10/update) to convert monetary units to U.S. dollars.
- If you are married as of today, report your and your spouse’s income, even if you were not married in 2008. Ignore references to spouse if you are single, divorced, separated or widowed.

<b>What income tax return did you file or will you file for 2008? (Q34)</b>	<input type="checkbox"/> IRS 1040 <input type="checkbox"/> IRS 1040A, 1040EZ <input type="checkbox"/> A foreign tax return	<input type="checkbox"/> A tax return with Puerto Rico, another U.S. territory or a Freely Associated State
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<b>If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ? (Q35)</b> A person is not eligible to file a 1040A or 1040EZ if he or she makes \$100,000 or more, itemizes deductions, receives income from his or her own business or farm, is self-employed, receives alimony or is required to file Schedule D for capital gains. If you were not required to file a tax return or you filed a 1040 only to claim Hope or Lifetime Learning tax credits, and you would otherwise have been eligible for a 1040A or 1040EZ, answer “Yes.”	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don’t know
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<b>What was your (and your spouse’s) adjusted gross income for 2008? (Q36)</b> Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.	\$ <input style="width: 80%;" type="text"/>
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<b>Questions 39 and 40</b> ask about earnings (wages, salaries, tips, etc.) in 2008. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on IRS Form 1040—lines 7 + 12 + 18 + Box 14 of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.	
<b>How much did you earn from working in 2008? (Q39)</b>	\$ <input style="width: 80%;" type="text"/>
<b>How much did your spouse earn from working in 2008? (Q40)</b>	\$ <input style="width: 80%;" type="text"/>

<b>What type of veterans’ education benefits will you receive? (Q45)</b> Answer this question only if you will receive these benefits between July 1, 2009 and June 30, 2010.	<input type="checkbox"/> Montgomery GI Bill - Active Duty (Chapter 30) <input type="checkbox"/> Post-9/11 GI Bill (Chapter 33) <input type="checkbox"/> Montgomery GI Bill - Selected Reserve (Chapter 1606) <input type="checkbox"/> Reserve Educational Assistance Program (Chapter 1607) <input type="checkbox"/> Vocational Rehabilitation and Employment (Chapter 31) <input type="checkbox"/> Dependents’ Educational Assistance (Chapter 35) <input type="checkbox"/> Any other type of veterans education benefits
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**If you answered “YES” to ANY question in Section 2, answer the following questions.  
If you answered “NO” to all the questions in Section 2, skip to page 7.**

<b>Your number of family members in 2009-2010. (Q96)</b> Include in your household: (1) yourself (and your spouse), (2) your children, if you will provide more than half of their support between July 1, 2009, and June 30, 2010, and (3) other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2009, and June 30, 2010.	<input style="width: 90%;" type="text"/>
<b>How many people in your (and your spouse’s) household will be college students between July 1, 2009 and June 30, 2010? (Q97)</b> Always count yourself. Include others only if they will attend, at least half-time in 2009-2010, a program that leads to a college degree or certificate.	<input style="width: 90%;" type="text"/>

<b>In 2007 or 2008, did you (or your spouse) or anyone in your household (from question 96) receive benefits from any of the federal benefits programs listed? (Q98-102) <i>Mark all the programs that apply.</i></b> Select benefits received for all of your household members. Use the instructions in question 96 to identify who is included in your household. Answering these questions will not reduce your eligibility for student aid or these other federal benefits. TANF may have a different name in your state. Call 1-800-4-FED-AID to find out the name of your state’s program.	<input type="checkbox"/> Supplemental Security Income <input type="checkbox"/> Food Stamps <input type="checkbox"/> Free or Reduced Price School Lunch <input type="checkbox"/> Temporary Assistance for Needy Families (TANF) <input type="checkbox"/> Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
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<b>As of today, are you (or your spouse) a dislocated worker? (Q103)</b> 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.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don’t know
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## SECTION 4 (CONTINUED) – STUDENT FINANCES

**Enter the amount of your (and your spouse's) income tax for 2008. (Q37)**

Income tax amount is on IRS Form 1040—line 56; 1040A—line 35; or 1040EZ—line 11.

\$

**Enter your (and your spouse's) exemptions for 2008. (Q38)**

Exemptions are on IRS Form 1040—line 6d or 1040A—line 6d. On the 1040EZ, if a person checked either the “you” or “spouse” box on line 5, use 1040EZ worksheet line F to determine the number of exemptions (\$3,500 equals one exemption). If a person didn't check either box on line 5, enter 01 if he or she is single, or 02 if he or she is married.

**Your 2008 Additional Financial Information amount (Q46) Complete the right column of the table on page 8.**

**Your 2008 Untaxed Income amount (Q47) Complete the right column of the table on page 8.**

**Student Asset Information** (See “Parent Asset Information” on page 5 for instructions on reporting assets.)

**As of today, what is your (and your spouse's) total current balance of cash, savings and checking accounts? (Q41) Do not include student financial aid.**

\$

**As of today, what is the net worth of your (and your spouse's) investments, including real estate (not your home)? (Q42) Net worth means current value minus debt.**

\$

**As of today, what is the net worth of your (and your spouse's) current businesses and/or investment farms? (Q43)**

\$

**Do not include** the value of a family farm that you (and your spouse) live on and operate.

**Do not include** the value of a small business if your family owns and controls more than 50 percent of the business and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you, such as a parent, sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law.

## SECTION 5 – COLLEGES TO RECEIVE INFORMATION

- If you do not know the school code, write the college's name. You will have a chance online to search for the school code.
- For each college, indicate the corresponding housing plan.

	1 <sup>st</sup> college	2 <sup>nd</sup> college	3 <sup>rd</sup> college	4 <sup>th</sup> college	5 <sup>th</sup> college
<b>Federal School Code</b>	<input type="text"/> (Q104.a)	<input type="text"/> (Q104.c)	<input type="text"/> (Q104.e)	<input type="text"/> (Q104.g)	<input type="text"/> (Q104.i)
<b>Housing Plan</b>	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.b)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.d)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.f)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.h)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.j)

	6 <sup>th</sup> college	7 <sup>th</sup> college	8 <sup>th</sup> college	9 <sup>th</sup> college	10 <sup>th</sup> college
<b>Federal School Code</b>	<input type="text"/> (Q104.k)	<input type="text"/> (Q104.m)	<input type="text"/> (Q104.o)	<input type="text"/> (Q104.q)	<input type="text"/> (Q104.s)
<b>Housing Plan</b>	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.l)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.n)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.p)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.r)	<input type="checkbox"/> on campus <input type="checkbox"/> with parent <input type="checkbox"/> off campus (Q104.t)

**Go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov) and enter the information from this worksheet.**

Additional help is available online, or you can call 1-800-4-FED-AID. TTY users (hearing impaired) may call 1-800-730-8913.  
For more information on federal student aid, visit [www.FederalStudentAid.ed.gov](http://www.FederalStudentAid.ed.gov).

You can also talk with your college's financial aid office about other types of student aid that may be available.

**DO NOT MAIL THIS WORKSHEET.**

**Use the tables below to report annual amounts.**

For the Parents' column, enter the amount for the student's parent(s). For the Student's column, enter the amount for the student (and his or her spouse).

Parents' (Q94)	<b>2008 Additional Financial Information</b>	Student's (Q46)
\$ <input type="text"/>	a. Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040—line 50 or 1040A—line 31.	\$ <input type="text"/>
\$ <input type="text"/>	b. Child support paid because of divorce or separation or as a result of a legal requirement. <small>Don't include support for children in your (or your parents') household, as reported in question 96 (or question 75 for your parents).</small>	\$ <input type="text"/>
\$ <input type="text"/>	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$ <input type="text"/>
\$ <input type="text"/>	d. Grant and scholarship aid reported to the IRS in the adjusted gross income. <small>Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.</small>	\$ <input type="text"/>
\$ <input type="text"/>	e. Combat pay or special combat pay. <small>Only enter the amount that was taxable and included in the adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).</small>	\$ <input type="text"/>
Parents' (Q95)	<b>2008 Untaxed Income</b>	Student's (Q47)
\$ <input type="text"/>	a. 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 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$ <input type="text"/>
\$ <input type="text"/>	b. 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.	\$ <input type="text"/>
\$ <input type="text"/>	c. Child support received for all children. <small>Don't include foster care or adoption payments.</small>	\$ <input type="text"/>
\$ <input type="text"/>	d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.	\$ <input type="text"/>
\$ <input type="text"/>	e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). <small>Exclude rollovers. If negative, enter a zero here.</small>	\$ <input type="text"/>
\$ <input type="text"/>	f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). <small>Exclude rollovers. If negative, enter a zero here.</small>	\$ <input type="text"/>
\$ <input type="text"/>	g. 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"/>
\$ <input type="text"/>	h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ <input type="text"/>
\$ <input type="text"/>	i. Other untaxed income not reported, such as workers' compensation, disability, etc. <b>Don't include</b> student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	\$ <input type="text"/>
XXXXXXXXXX	j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ <input type="text"/>



# HIGH SCHOOL & BEYOND PLAN CHECKLIST – GR 12

Name: \_\_\_\_\_

Advisor: \_\_\_\_\_

**CAREER PATHWAY:**

Which career pathway have you selected?

- Agriculture, Science, and Natural Resources
- Art, Media, Communications, and Design
- Business, Management, and Finance
- Education, Social, and Health Services
- Engineering, Science, and Technology

Career(s) of Interest: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**CAREER RESEARCH:** Steps you have taken to be able to pursue a career that interests you:

- Taken needed electives in my pathway (details): \_\_\_\_\_  
\_\_\_\_\_
- Updated resume (or will before graduation): \_\_\_\_\_
- Conducted career interviews (list):
  1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
- Completed a job shadow: \_\_\_\_\_
- Obtained summer job or internship: \_\_\_\_\_

**POSTSECONDARY RESEARCH:** Your postsecondary plan based on the educational requirements for your top career choice (*check as many as apply*):

- No more education needed (explain why): \_\_\_\_\_  
\_\_\_\_\_
- Apprenticeship – Length, details: \_\_\_\_\_  
\_\_\_\_\_
- Two-year degree (AA or AS) – Major: \_\_\_\_\_
- Four-year degree (BA or BS) – Major: \_\_\_\_\_
- Postgraduate degree – Describe: \_\_\_\_\_

**POSTSECONDARY PLANNING:** Postsecondary institutions you have researched and decided to apply to.  
(List institution and the major you wish to pursue; list military here if you plan to enlist):

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**POSTSECONDARY PREPARATION:** Steps you have completed or plan to take:

- Postsecondary visits, workplace interviews or discussions with a recruiter
- PSAT (for 4-year college)
- SAT Reasoning, SAT Subject Tests and/or ACT (for 4-year college)
- ASSET and/or COMPASS (for community or technical college)
- ASVAB (for military)
- Completed applications for all institutions listed above

**FINANCIAL PREPARATION:** Steps you have taken or will take to prepare yourself for the future:

- Have completed the FAFSA with parents
- Have researched scholarship opportunities
- Have researched tuition and living expenses at postsecondary institutions listed above
- Have started a savings or checking account and/or obtained a debit card
- Have researched insurance issues related to turning 18: health and auto

**COMMUNITY INVOLVEMENT:** Steps you have taken or will take to become involved in the community:

- Have begun or completed volunteer service: \_\_\_\_ hours
- Have registered to vote (when 18)
- Have registered with Selective Service (for males, when 18)

**BEYOND PLAN – BACKUP PLAN:** Please describe briefly below what you plan to do next year AND what you will do if that plan doesn't work out.

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