

Department of Educational Leadership and Foundations
Application for Student Financial Aid

Request for Calendar Year: _____

1. Name: _____ BYU ID: _____ Year Started: _____

2. Your EDLF Program

- Education Policy Studies
- M.Ed. School Leadership (LPP track)
- M.Ed. School Leadership (ExSL track)
- Ed.D.
- Licensure Only

3. Your Citizenship

- U.S.
- Other: _____

4. As of today, are you married? (Answer yes if you are separated, but not divorced.)

- Yes
- No
- If married, is your spouse (check all that apply):
 - A student
 - Employed part time
 - Employed full time

5. Your Dependents: Answer "Yes" below IF:

- (1) You have children who receive more than half of their support from you; or
 - (2) You have dependents (other than your children or spouse) who live with you and receive more than half of their support from you, now and through this year.
- Yes
 - No

6. How many people are in your (and your spouse's) household? _____

7. How many people in **question 6** will be college students between 17 and 26 years of age? _____

8. In addition to a financial aid grant, are you interested in student loans (which you must pay back)?

- Yes
- No

9. In addition to a financial aid grant, are you interested in work as a research assistant?

- Yes
- No

10. Have you filed your IRS income tax return for the past year?

- I have already filed.
- I'm not going to file.
- I will file, but I have not yet filed.

11. What income tax return did you file or will you file for the past year?

- IRS 1040.
- A foreign tax return.
- IRS 1040A, 1040EZ, 1040Telefile.
- A tax return for Puerto Rico, Guam, American Samoa, the Virgin Islands, the Marshall Islands, the Federated States of Micronesia, Palau.

12. Enter your (and spouse's) total number of exemptions. _____
 (Exemptions are on IRS Form 1040-line 6d, or on Form 1040A-line 6d.)

Please fill out the following items in the table below:

13.	Enter the total amount of your (and spouse's) Adjusted Gross Income (AGI) from last year's taxes	\$
14.	Enter any Earned Income Credit (IRS Form 1040-line 59a; 1040A-line 37a; 1040EZ-line 8a; or Telefile-line L.)	\$
15.	Total current balance of cash, savings, and checking accounts.	\$
16.	Current net worth of investments (investment value minus investment debt).	\$
17.	Current net worth of business (business value minus business debt).	\$
18.	Amount net worth of car (value minus debt).	\$
19.	Amount net worth of home(s) and/or rental units (value minus debt).	\$
20.	Total from Worksheet A	\$
	Total (Lines 13-20)	\$

I affirm that the information provided in this application is complete and accurate and represents my actual financial status.

Signature _____ Date: _____

NOTE: Please attach a one-page or less description of any extenuating circumstances that we should consider.

Worksheet A

Use this worksheet to identify additional income not included in the Questions 13-19 above.
Enter the total on Line 20.

Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including amounts reported on the W-2 Form in Box 13, codes D, E, F, G, H, and S. Include untaxed portions of 401(k) and 403(b) plans.	\$
Deductible IRA and/or Keogh payments (IRS Form 1040-total of lines 23 and 29; or 1040A-line 15)	\$
Child support received for all children. Don't include foster care or adoption payments.	\$
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps.	\$
Tax exempt interest income from IRS Form 1040A-line 8b.	\$
Foreign income exclusion from IRS Form 1040-line 8b; or 1040A-line 8b.	\$
Untaxed portions of pensions from IRS Form 1040 (line 15a minus 15b) plus (16a minus 16b); or 1040A-(line 10a minus 10b) plus (11a minus 11b) excluding rollovers.	\$
Credit for federal tax on special fuels from IRS Form 4136-line 9 – non-farmers only.	\$
Social Security benefits received that were not taxed.	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits)	\$
Worker's Compensation.	\$
Housing, food, and other living allowances paid to members of the military, clergy, and others (including cash payments and cash value of benefits.	\$
Any other untaxed income and benefits, such as VA Educational Work-Study allowances, untaxed portions of Railroad Retirement Benefits, Black Lung Benefits, Refugee Assistance, etc. Don't include student aid, educational WIA (formerly JTPA) benefits, or benefits from flexible spending arrangements, e.g., cafeteria plans.	\$
Cash received , or any money paid on your behalf, not reported elsewhere on this form.	\$
TOTAL -- Enter total amount and also enter in on Line 20.	\$