CollegeBoard

# Noncustodial Parent's Statement
## School Year 2014-15

***This form is to be filed by the noncustodial parent (whether divorced, separated or never married).***

This form is used by many colleges and universities to evaluate the financial strength of the student's noncustodial parent. These schools adhere to the principle that both parents, regardless of their current marital status, have the primary responsibility for providing for their child's education and should be expected to provide reasonable financial support before college resources are used.

## INSTRUCTIONS FOR COMPLETING THE NONCUSTODIAL PARENT'S STATEMENT

Because most of the questions are self-explanatory, the instructions below are only for questions that may need some explanation.

For some of the questions in Section III, it may be helpful to refer to your U.S. income tax return (IRS Form 1040, 1040A, or 1040EZ). **The IRS line references are for 2013.** If you have not completed a 2013 tax return, estimate as accurately as possible. Some colleges will require a copy of your tax return.

**11.** Write in the amount of U.S. income tax paid (or to be paid). Refer to your 2013 IRS Form. Do not copy the amount of "federal income tax withheld" from a W-2 Form.

**15a.** Include only amounts that you get for yourself, your current spouse, and dependent children under age 18. Do not include amounts received for the student.

**15e.** Enter any other income that is not included in any other question.

**17.** Write in the amount of educational loan repayments that you (and your spouse) made in 2013. Include loans obtained by you (and your spouse) for your own education or for the education of the student, the student's siblings, or the student's stepbrothers or stepsisters.

**18.** Write in the amount of medical and dental expenses paid in 2013. Include the cost of insurance premiums for medical and dental care. Don't include amounts covered by insurance, your company medical reimbursement account (flexible spending account), or self-employed health deductions.

In Section V do not report any asset more than once. If you jointly own assets with your former spouse, include only your (and your current spouse's) portion of the assets and debts.

**21–25.** In questions 21, 22 and 25, "present market value" means the amount that the asset could currently be sold for. Do not use valuation such as assessed value, insured value or tax value. Include in 24 funds held in Section 529 college savings plans or prepaid tuition plans established for the student and the student's siblings and stepsiblings who are counted in question 5.

## SECTION I—STUDENT APPLICANT INFORMATION

**1. a. Student's name** ______ **Last** ______ **First** ______ **M.I.**

**b. Student's Social Security number** ___ - __ - ____

**c. Student's primary residence is:** ☐ with mother. ☐ with father. ☐ equally shared with mother and father.

## SECTION II—NONCUSTODIAL PARENT'S (AND CURRENT SPOUSE'S) INFORMATION

**2. Student's noncustodial parent**

a. **Name** ______ b. **Age** ______

c. **Street address** ______

**City, state, ZIP code** ______

d. **Occupation** ______

e. **Employer** ______ **No. years** ______

f. **Are you covered by this employer's pension plan?** ☐ Yes ☐ No

g. **If unemployed, date unemployment began** ______

h. **Preferred daytime telephone** ___ ___ ____

i. **Date of: Separation** ______ **Divorce** ______

j. **If you have remarried, date of remarriage** ______

**3. Noncustodial parent's current spouse (if applicable)**

a. **Name** ______ b. **Age** ______

c. **Occupation** ______

d. **Employer** ______ **No. years** ______

e. **Is your spouse covered by this employer's pension plan?** ☐ Yes ☐ No

**4. Noncustodial parent's support of former household**

a. **Who claimed student as a dependent on 2013 U.S. income tax return?**
☐ Mother ☑ Father ☐ Neither Parent

| | 2013 | 2014 |
|---|---|---|
| b. **Annual child support paid for all children** | $ .00 | $ .00 |
| c. **Annual child support paid for the student applicant** | $ .00 | $ .00 |

d. **When will (did) student applicant's support end?** ______

| | | |
|---|---|---|
| e. **Alimony paid** | $ .00 | $ .00 |
| | **2013-14** | **2014-15** |
| f. **How much do you expect to contribute to the student applicant's education, excluding child support?** | $ .00 | $ .00 |

g. **Is there an agreement specifying this contribution for the student's education?** ☐ Yes ☐ No

**5. Enter the number of people in your family.** Include yourself, your current spouse, the student, and other children who are under age 24 that you share with the student's custodial parent, even if they do not live with you. Include other people if they currently live with you and receive more than half of their support from you and your current spouse. ☐☐

**6. Write in the number of children from question 5 who will attend college at least half-time during 2014-15.** ☐

**7. Give information for all individuals included in your family in question 5.** Include yourself and your current spouse (if any).

| Full name of family member | Use codes from below. | Age | Claimed by parents as tax exemption in 2012? Yes | No | 2013-14 School Year: Name of school or college | Year in school | Scholarships and grants | Parents' contribution | 2014-15 School Year: Attend college at least one term: Full time | Part time | College name |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |
| | | | ☐ | ☐ | | | | | ☐ | ☐ | |

Write in the correct code from the right. 1 - Student's parent, 2 - Parent's current spouse, 3 - Student's brother or sister, 4 - Student's stepbrother or stepsister, 5 - Student's husband or wife, 6 - Student's child/stepchild, 7 - Student's grandparent, 8 - Other

## SECTION III—NONCUSTODIAL PARENT'S (AND CURRENT SPOUSE'S) 2013 INCOME

**8. The following 2013 U.S. income tax return figures are:** (Fill in only one oval.)

☐ estimated. Will file IRS Form 1040EZ or 1040A. ☐ estimated. Will file IRS Form 1040. ☐ from a completed IRS Form 1040EZ or 1040A. ☐ from a completed IRS Form 1040. ☐ a tax return will not be filed. (Skip to 13.)

**As of publication the IRS had not finalized 2013 tax returns. Please validate your answers against your 2012 return.**

Tax Filers Only

| | | | |
|---|---|---|---|
| 9. | **2013 total number of exemptions** (IRS Form 1040, line 6d or 1040A, line 6d. For 1040EZ, see 1040EZ Worksheet.) | 9. | |
| 10. | **2013 Adjusted Gross Income** (IRS Form 1040, line 37 or 1040A, line 21 or 1040EZ, line 4) | 10. | $ .00 |
| | **Breakdown of income in 10** | | |
| | **a. Wages, salaries, tips** (IRS Form 1040, line 7 or 1040A, line 7 or 1040EZ, line 1) | a. | $ .00 |
| | **b. Interest and dividend income** (IRS Form 1040, lines 8a and 9a or 1040A, lines 8a and 9a or 1040EZ, line 2) | b. | $ .00 |
| | **c. Net income (or loss) from business, farm, rents, royalties, partnerships, estates, trusts, etc.** (IRS Form 1040, lines 12, 17, and 18) If a loss, enter the amount in parentheses. | c. | $ .00 |
| | **d. Other taxable income such as alimony received, capital gains (or losses), pensions, annuities, etc.** (IRS Form 1040, lines 10, 11, 13, 14, 15b, 16b, 19, 20b, and 21, or 1040A, lines 10, 11b, 12b, 13, and 14b, or 1040EZ, line 3) | d. | $ .00 |
| | **e. Adjustments to income** (IRS Form 1040, line 36 or 1040A, line 20) | e. | $ .00 |
| 11. | **a. 2013 U.S. income tax paid** (IRS Form 1040, line 55 or 1040A, line 35 or 1040EZ, line 10) | 11. a. | $ .00 |
| | **b. 2013 education credits—Hope and Lifetime Learning** (IRS Form 1040, line 49 or 1040A, line 31) | b. | $ .00 |
| 12. | **2013 itemized deductions** (IRS Schedule A, line 29. [Write in "0" if deductions were not itemized.]) | 12. | $ .00 |
| 13. | **2013 income earned from work by student's noncustodial parent** | 13. | $ .00 |
| 14. | **2013 income earned from work by noncustodial parent's current spouse** | 14. | $ .00 |
| 15. | **2013 untaxed income and benefits** (Give total amount for the year. Do not give monthly amounts.) | | |
| | **a. Social Security benefits received** (Untaxed portion only—see instructions on page 1.) | 15. a. | $ .00 |
| | **b. Child support received for all children** | b. | $ .00 |
| | **c. Deductible IRA and/or SEP, SIMPLE or Keogh payments** | c. | $ .00 |
| | **d. Payments to tax-deferred pension and savings plans** | d. | $ .00 |
| | **e. Other—Earned Income Credit; housing, food and living allowances; tax-exempt interest income; foreign income exclusion; etc.** | e. | $ .00 |

## SECTION IV—NONCUSTODIAL PARENT'S (AND CURRENT SPOUSE'S) 2013 EXPENSES

| | | | |
|---|---|---|---|
| 16. | **Child support paid by both the noncustodial parent and spouse because of divorce or separation** | 16. | $ .00 |
| 17. | **Repayment of noncustodial parent's and spouse's education loans** (See instructions on page 1.) | 17. | $ .00 |
| 18. | **Medical and dental expenses not covered by insurance** (See instructions on page 1.) | 18. | $ .00 |
| 19. | **Total elementary school, junior high school and high school tuition paid for dependent children** | | |

**a. Amount paid** (Don't include tuition paid for the student.) $ .00 **b. For how many dependent children?** (Don't include the student.)

## SECTION V—NONCUSTODIAL PARENT'S (AND CURRENT SPOUSE'S) ASSETS AND DEBTS

If current spouse holds more than 50 percent of any asset listed below, give details in Section VI. (See instructions on page 1.)

**20. a. Housing payment** (Check one.) ☐ Rent ☐ Mortgage **b. Monthly amount** (If zero, explain in Section VI.) $ .00

| | Year purchased | Purchase price | Present market value | Unpaid mortgage principal |
|---|---|---|---|---|
| **21. Home—if owned or being purchased** | 21. $ .00 | $ .00 | $ .00 | $ .00 |
| **22. Other real estate** | 22. $ .00 | $ .00 | $ .00 | $ .00 |

**23. Cash, savings, checking accounts, bonds and trust funds (as of today)** 23. $ .00

**24. Investments—net value of stocks and other securities** (List kinds and amounts in Section VI.) 24. $ .00

**25. Business and/or farm** **25. a.** Present market value $ .00 **b.** Indebtedness $ .00 **c.** Percentage of ownership %

**26. Current value of tax-deferred pensions, annuities and savings plans** (for example, SRAs, 401(k)s, TDAs, 403(b)s, 408s, 457s, 501(c)s, etc.) 26. $ .00

## SECTION VI—REMARKS

If you have any special circumstances, or additional information was requested above, please list them on a separate piece of paper and return it with this form.

## SECTION VII—CERTIFICATION AND AUTHORIZATION

I declare that the information reported on this form is true, correct and complete.

I agree that, to verify information reported on this form, I will on request provide an official copy of my U.S. income tax return.

I further agree to provide, if requested, any other official documentation necessary to verify information reported.

**Noncustodial parent's signature**

**Date completed**

➤ **Do you authorize the college to discuss the information collected on this form with the student applicant?**
☐ Yes ☐ No