

UNC Application for Aid

July 1, 2019 – June 30, 2020

Step One (Student): For questions 1-22, leave any questions that do not apply to you (the student) blank.

Your full legal name. If your name has a suffix, such as Jr. or III, include a space between your last name and suffix.

1. Last name		2. First name		3. Middle initial	
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Your permanent mailing address

4. Number and street (include apt. number)															
5. City (and country if not U.S.)											6. State		7. ZIP code		

8. Your Bear Number		9. Your date of birth	MONTH	DAY	YEAR	10. Your telephone number				
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Your driver's license number and driver's license state (if you have one)

11. Driver's license number		12. Driver's license state	
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13. Your e-mail address. If you provide your e-mail address, we will be able to communicate with you electronically. If you do not have an e-mail address, leave this field blank.

14. What is your marital status as of today?	I am single ☐ 1	I am separated ☐ 3	15. Month and year you were married, remarried, separated, divorced or widowed.	MONTH	YEAR
	I am married/remarried ☐ 2	I am divorced or widowed ☐ 4			

16. What is your state of residence?	STATE	17. Are you male or female?	Male ☐ 1	Female ☐ 2
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18. What will your high school completion status be when you begin college in the 2019-2020 school year?

High school diploma. Answer question 19.	☐ 1	Homeschooled. Skip to question 20	☐ 3
General Educational Development (GED) certificate or state certificate. Skip to question 20.	☐ 2	None of the above Skip to question 20	☐ 4

19. What is the name of the high school where you received or will receive your high school diploma? Enter the complete high school name, and the city and state where the high school is located.

High School Name

High School City

STATE

20. Will you have your first bachelor's degree before you begin the 2019-2020 school year?

Yes ☐ 1 No ☐ 2

21. What will your college grade level be when you begin the 2019-2020 school year?

- Never attended college and 1st year undergraduate ☐ 0
- Attended college before and 1st year undergraduate ☐ 1
- 2nd year undergraduate/sophomore ☐ 2
- 3rd year undergraduate/junior ☐ 3
- 4th year undergraduate/senior ☐ 4
- 5th year/other undergraduate ☐ 5
- 1st year graduate/professional ☐ 6
- Continuing graduate/professional or beyond ☐ 7

22. Will you be working on your first bachelor's degree when you begin the 2019-2020 school year?

- Yes ☐ 1
- No ☐ 2

Step Two (Student):

Answer questions 23–49 about yourself (the student). If you were never married, or are separated, divorced or widowed and are not remarried, answer only about yourself. If you are married or remarried as of today, include information about your spouse.

23. For 2017, have you (the student) completed your IRS income tax return or another tax return listed in question 24?

- I have already completed my return ☐ 1
- I will file but have not yet completed my return ☐ 2
- I'm not going to file. **Skip to question 30.** ☐ 3

24. What income tax return did you file or will you file for 2017?

- IRS 1040 ☐ 1
- IRS 1040A or 1040EZ ☐ 2
- A foreign tax return ☐ 3
- A tax return with Puerto Rico, another U.S. territory, or Freely Associated State ☐ 4

25. For 2017, what is or will be your tax filing status according to your tax return?

- Single ☐ 1
- Head of household ☐ 4
- Married—filed joint return ☐ 2
- Married—filed separate return ☐ 3
- Qualifying widow(er) ☐ 5
- Don't know ☐ 6

26. If you have filed or will file a 1040, were you eligible to file a 1040A or 1040EZ?

Yes ☐ 1 No ☐ 2 Don't know ☐ 3

For questions 27–36, if the answer is zero or the question does not apply to you, enter 0. Report whole dollar amounts with no cents.

27. What was your (and spouse's) adjusted gross income for 2017? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

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28. Enter your (and spouse's) income tax for 2017. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10.

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29. Enter your (and spouse's) exemptions for 2017. Exemptions are on IRS Form 1040—line 6d or Form 1040A—line 6d. If you filed a Form 1040EZ, leave blank.

Questions 30 and 31 ask about earnings (wages, salaries, tips, etc.) in 2017. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms or on the tax return selected in question 24: IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1. If any individual earning item is negative, do not include that item in your calculation.

30. How much did you earn from working in 2017?

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31. How much did your spouse earn from working in 2017?

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32. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? Don't include student financial aid.

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33. As of today, what is the net worth of your (and spouse's) investments, including real estate? Don't include the home you live in.

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34. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

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35. Student's 2017 Additional Financial Information (Enter the combined amounts for you and your spouse.)

- a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.
- b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household, as reported in question 84.
- c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
- d. Taxable college grant and scholarship aid reported to the IRS as income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
- e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Don't include untaxed combat pay.
- f. Earnings from work under a cooperative education program offered by a college.

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36. Student's 2017 Untaxed Income (Enter the combined amounts for you and your spouse.)

- a. Payments to tax-deferred pension and retirement 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. **Don't include** amounts reported in code DD (employer contributions toward employee health benefits)
- 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.
- c. Child support received for any of your children. **Don't include** foster care or adoption payments.
- d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.
- e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). **Exclude rollovers.** If negative, enter a zero here.
- f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). **Exclude rollovers.** If negative, enter a zero here.
- g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.
- h. Veterans noneducation benefit, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- i. Other untaxed income not reported in items 36a through 36h, such as workers' compensation, disability benefit, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. **Don't include** extended foster care benefit, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefit, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefit, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.
- j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

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Step Three (Student):

Answer the questions in this step to determine if you will need to provide parental information. Once you answer "Yes" to any of the questions in this step, skip Step Four and go to Step Five on page 6.

37. Were you born before January 1, 1996?	Yes	☐ 1	No	☐ 2
38. As of today, are you married? (Also answer "Yes" if you are separated but not divorced)	Yes	☐ 1	No	☐ 2
39. At the beginning of the 2019-2020 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.)	Yes	☐ 1	No	☐ 2
40. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	Yes	☐ 1	No	☐ 2
41. Are you a veteran of the U.S. Armed Forces?	Yes	☐ 1	No	☐ 2
42. Do you now have or will you have children who will receive more than half of their support from you between July 1, 2019 and June 30, 2020?	Yes	☐ 1	No	☐ 2
43. 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, 2020?	Yes	☐ 1	No	☐ 2
44. 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?	Yes	☐ 1	No	☐ 2
45. As determined by a court in your state of legal residence, are you or were you an emancipated minor?	Yes	☐ 1	No	☐ 2
46. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?	Yes	☐ 1	No	☐ 2
47. At any time on or after July 1, 2018, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?	Yes	☐ 1	No	☐ 2
48. At any time on or after July 1, 2018, 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 or were self-supporting and at risk of being homeless?	Yes	☐ 1	No	☐ 2
49. At any time on or after July 1, 2018, 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?	Yes	☐ 1	No	☐ 2

Step Four (Parent): Complete this step if you (the student) answered “No” to all questions in Step Three.

Step Four CONTINUES on Page 5

For questions 74–83, if the answer is zero or the question does not apply, enter 0. Report whole dollar amounts with no cents.

74. What was your parents' adjusted gross income for 2017? Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

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75. Enter your parents' income tax for 2017. Income tax amount is on IRS Form 1040—line 56 minus line 46; 1040A—line 28 minus line 36; or 1040EZ—line 10.

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76. Enter your parents' exemptions for 2017. Exemptions are on IRS Form 1040—line 6d or on Form 1040A—line 6d. If you filed a Form 1040EZ—leave blank.

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Questions 77 and 78 ask about earnings (wages, salaries, tips, etc.) in 2017. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms or on the tax return selected in question 70: IRS Form 1040—lines 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1. If any individual earning item is negative, do not include that item in your calculation. Report the information for the parent listed in questions 52-55 in question 77 and the information for the parent listed in questions 56-59 in question 78.

77. How much did Parent 1 (father/mother/stepparent) earn from working in 2017?

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78. How much did Parent 2 (father/mother/stepparent) earn from working in 2017?

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79. As of today, what is your parents' total current balance of cash, savings, and checking accounts? Don't include student financial aid.

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80. As of today, what is the net worth of your parents' investments, including real estate? Don't include the home in which your parents live.

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81. As of today, what is the net worth of your parents' current businesses and/or investment farms? Don't include a family farm or family business with 100 or fewer full-time or full-time equivalent employees.

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82. Parents' 2017 Additional Financial Information (Enter the amounts for your parent[s].)

a. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040—line 50 or 1040A—line 33.

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b. Child support paid because of divorce or separation or as a result of a legal requirement. **Don't include** support for children in your parents' household, as reported in question 62.

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c. Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.

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d. Your parents' taxable college grant and scholarship aid **reported to the IRS as income**. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

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e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. **Don't include** untaxed combat pay.

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f. Earnings from work under a cooperative education program offered by a college

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83. Parents' 2017 Untaxed Income (Enter the amounts for your parent[s].)

a. Payments to tax-deferred pension and retirement 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. **Don't include** amounts reported in code DD (employer contributions toward employee health benefits)

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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.

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c. Child support received for any of your parents' children. **Don't include** foster care or adoption payments.

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d. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.

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e. Untaxed portions of IRA distributions from IRS Form 1040—lines (15a minus 15b) or 1040A—lines (11a minus 11b). **Exclude rollovers**. If negative, enter a zero here.

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f. Untaxed portions of pensions from IRS Form 1040—lines (16a minus 16b) or 1040A—lines (12a minus 12b). **Exclude rollovers**. If negative, enter a zero here.

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g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). **Don't include** the value of on-base military housing or the value of a basic military allowance for housing.

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h. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.

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i. Other untaxed income not reported in items 83a through 83h, such as workers' compensation, disability benefit, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040—line 25. **Don't include** extended foster care benefit, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefit, Supplemental Security Income, Workforce Innovation and Opportunity Act educational benefits, on-base military housing or a military housing allowance, combat pay, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit or federal tax on special fuels.

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Step Five (Student): Complete this step **ONLY** if you (the student) answered "Yes" to any questions in Step Three.

84. How many people are in your household?

Include:

- yourself (and your spouse),
- your children, if you will provide more than half of their support between July 1, 2019 and June 30, 2020, even if they do not live with you, and
- 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, 2019 and June 30, 2020.

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85. How many people in your (and your spouse's) household (from question 84) will be college students between July 1, 2019 and June 30, 2020? Always count yourself as a college student. Do not include family members who are in U.S. military service academies. Include others only if they will attend, at least half-time in 2019-2020, a program that leads to a college degree or certificate.

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At any time during 2017 or 2018, did you (or your spouse) or anyone in your household (from question 84) receive benefits from any of the federal programs listed

Mark all that apply. Answering these questions will NOT reduce eligibility for student aid or these programs. TANF has different names in many states. Call 1-800-433-3243 to find out the name of your state's program.

86. Medicaid or
Supplemental
Security Income (SSI) ☐

87. Supplemental
Nutrition Assistance
Program (SNAP) ☐

88. Free or Reduced
Price School
Lunch ☐

89. Temporary Assistance
for Needy Families
(TANF) ☐

90. Special Supplemental Nutrition
Program for Women, Infants,
and Children (WIC) ☐

91. As of today, are you (or your spouse) a dislocated worker?

Yes ☐ ¹ No ☐ ² Don't know ☐ ³

92. As of today, what are your housing plans?

On Campus ☐ Off Campus ☐ With parent(s) ☐

Step Six (Student and Parent): Read, sign and date.

If you are the student, by signing this application you certify that you will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education.

By signing this application you, the student and the parent, certify that all of the information you provided is true and complete to the best of your knowledge, and you agree if asked, to provide follow up documentation that will support the accuracy of your completed form. This information may include a return transcript from the U.S. income tax forms that you filed or may be required to file.

Knowingly providing false or misleading information is subject to having to repay any UNC funds received and/or disciplinary action.

93. Date this form was completed

MONTH DAY 2018 ☐
2019 ☐
2020 ☐

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94. Student (Sign below)

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95. Parent (A parent from Step Four sign below.)

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