



# INDIANA UNIVERSITY FORT WAYNE OFFICE OF STUDENT FINANCIAL SERVICES

## 2020-2021 Dependent Household Worksheet

Complete every section and sign the worksheet. Do not leave any section blank. Please print clearly.

Student Name (printed): \_\_\_\_\_ Student ID#: \_\_\_\_\_

### Section 1 – Parent's Marital Status

- If your parents are married to each other list both of them on this form.
- If your parent has remarried include your stepparent's information.
- If your parent was divorced or separated before filing the FAFSA, exclude his/her spouse's information.
- If your parents are unmarried, but living together, report both of them on this form.
- If you are not sure which parent(s) you should be providing information for please visit [www.go.iu.edu/1PEO](http://www.go.iu.edu/1PEO).

What is your parents' current marital status? (Select one):

- |   |   |
|---|---|
| <input type="checkbox"/> Never Married/Single | <input type="checkbox"/> Unmarried and both parents living together |
| <input type="checkbox"/> Separated            | <input type="checkbox"/> Divorced                                   |
| <input type="checkbox"/> Married/Remarried    | <input type="checkbox"/> Widowed                                    |

Date the above status occurred \_\_\_\_\_  
Month Year

### Section 2 – Household Information

List below the people in the parent's household. Include:

- Yourself
- Your parent(s) – refer to section 1
- Anyone that lives in your parent's household (including siblings living away at college) and for whom your parents will provide more than half of their support from July 1, 2020 through June 30, 2021.
- Be sure to include the Name, Age, and Relationship or the worksheet will be considered incomplete.

Name of household member	Age	Relationship to the student	List the name of the college/university where this household member will attend at least half-time during 2020-2021. To be listed, student must be in a program leading to a degree or certificate at an institution which awards Title IV aid.
		Self/Student	
		Parent/Step-Parent	
		Parent/Step-Parent	

(See reverse page)



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#### Section 3- Assets

*Do not leave this section blank. Amounts listed should reflect amount at the time the FAFSA was filed.*

Student	Parent(s)	
\$	\$	At the time the FAFSA was filed, the balance of cash, savings and checking accounts.
\$	\$	At the time the FAFSA was filed, the net worth of your investments, including real estate (excluding the home in which you live).
\$	\$	At the time the FAFSA was filed, the net worth of your current business(es) and/or investment farms? (Do not include a family farm or family business with 100 or fewer full-time employees)

#### NOTES

Net worth means value minus debt at the time you filed the FAFSA. If net worth is negative, enter 0.

**Investments include** real estate (do not include the home you live in), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. Investments also include qualified educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). For a student who must report parental information, the accounts are reported as parental investments, including all accounts owned by the student and all accounts owned by the parents for any member of the household.

**Investments do not include** the home you live in, the value of life insurance, ABLE accounts, retirement (401(k)) plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts already reported. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner.

Investment value means the balance or market value of these investments at the time you filed the FAFSA. Investment debt means only those debts that are related to the investments.

**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.

**Business value does 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.

**Investment farm value does not include** the value of a family farm that you (your spouse and/or your parents) live on and operate.

#### Section 4 – Certification: Print & Sign. Electronic Signatures are not acceptable. Please retain a copy for your records.

By signing this worksheet, we certify that all the information reported is complete and accurate. Electronic signatures are not acceptable.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student's University ID Number

\_\_\_\_\_  
Parent Signature and Date