

TGKVF 2017-2018 Financial Form

If you are a **dependent applicant**, have your parents complete this form using information from their 2016 Federal Income Tax Return and attach a copy. (If your parents have not filed taxes by the time you are filling this out, you must use estimated numbers from 2016 and attach a copy of 2015 IRS Form 1040.) If you are **independent**, information about you and your spouse (if applicable) must be attached. You do not need to supply information from your parents. Figures should be taken from your 2016 Federal Income Tax Return. (If you have not filed taxes by the time you are filling this out, you must use estimated numbers from 2016 and attach one copy of your 2015 IRS Form 1040.) Please attach a copy of your income tax return.

Student's Name _____

- I am using numbers from my 2016 tax return. I am using estimated numbers from my 2016 tax return and I am sending a copy of my 2015 tax return
- I am using numbers from my 2015 tax return I am a Dependent (complete both columns)
- I am Independent (complete Applicant column only)

- | | | |
|---|-------------------------|-------------------------|
| 1. Annual adjusted gross income | \$ _____ | |
| 2. Annual income earned from work by: Father/Stepparent/Guardian 1 | \$ _____ | Applicant \$ _____ |
| Mother/Stepparent/Guardian 2 | \$ _____ | Spouse \$ _____ |
| | <u>Parent(s)</u> | <u>Applicant</u> |
| 3. Untaxed income/benefits (Child Support, AFDC, ADC, SSI, etc.)
Or miscellaneous income. List source of benefit _____ | \$ _____ | \$ _____ |
| 4. Cash, savings, stocks, bonds, CDs, etc.
(exclude retirement funds, i.e. IRA) | \$ _____ | \$ _____ |
| 5. Net value of real estate holdings not used as a
primary residence (market value less mortgage balance) | \$ _____ | \$ _____ |
| 6. Do you have a College Savings Plan (ex. 529 Plan)? Yes <input type="checkbox"/> NO <input type="checkbox"/> | | |
| If yes, what is the total | \$ _____ | |

7. List other sources of financial aid and amounts (including scholarships, loans, etc.) which you have been awarded:

8. Total number in household: ____ Total number of children attending college during the 2016-2017 academic year: ____

Father/Stepfather/Guardian 1's Occupation _____ Applicant's occupation _____

Mother/Stepmother/Guardian 2's Occupation _____ Spouse of Applicant's Occupation _____

Certification: I (we) certify that all the information on this form is true and complete to the best of my (our) knowledge. If asked by any authorized official of The Greater Kanawha Valley Foundation, I (we) agree to give documentation for information given on this form. I (we) realize that failure to comply with a request for further information may prevent the applicant from receiving any aid. I have attached a copy of my most recent IRS Form 1040.

(Type) Applicant's Name _____ Date ____/____/____

(Type) Parent or spouse's Name _____ Date ____/____/____

***In the following box note any extenuating circumstances for a significant change in income since my 2016 tax return**