



Student Financial Services  
University of Pennsylvania  
005 Franklin Building  
3451 Walnut Street  
Philadelphia, PA 19104-6270  
www.srfs.upenn.edu

## Penn Financial Aid Supplement

U.S. Citizens and Permanent Residents

2018-2019 Academic Year

### Deadlines

Freshmen, Early Decision	Accelerated Nursing	Freshmen, Regular Decision	Transfers, October Admission	Returning Students (Except LPS)
November 6, 2017	December 15, 2017	February 2, 2018	April 16, 2018	April 23, 2018

Last Name  First  Initial  Birthdate

Penn I.D. #

Address      
Street City State Zip Code

Phone #  Email

Parent 1 Name  Parent 1  
Daytime Phone #

Parent 2 Name  Parent 2  
Daytime Phone #

### 1. I am applying as a:

- ☐ Freshman  
☐ Currently Enrolled Penn Student  
☐ Accelerated Nurse/Incoming  
☐ Transfer   
(month and year of expected graduation)

### 2. Where do you intend to live during the 2018-2019 academic year?

- ☐ College House  
☐ Off-Campus  
☐ At home with your family

### 3. Is either your parent or spouse a full-time employee of the University of Pennsylvania or Penn Medicine, or its affiliates?

☐ Parent ☐ Spouse ☐ Neither

☐ If yes, are you eligible for Faculty/Staff Tuition Remission?

☐ 100% Remission ☐ 75% Remission ☐ 50% Remission

### Estimated Resources

#### 4. From the sources listed below, what do you estimate contributing towards your education? Do not include anticipated financial aid.

From parent(s) income/assets \$

Child support/non-custodial parent contribution \$

From student assets \$

Student earnings from summer 2018 employment \$

Outside scholarships \$

Grants from parent(s) employer \$

Other (please specify) \$

**Total** \$

## Student Financial Information

5. From the sources listed below, indicate the amount of student assets, including the asset source (for example: from parents' savings, student earnings, inheritance, etc)

	source	
Cash and savings	<input type="text"/>	\$ <input type="text"/>
Stocks, bonds, CD's	<input type="text"/>	\$ <input type="text"/>
Other (please specify)	<input type="text"/>	\$ <input type="text"/>
<b>Total</b>		\$ <input type="text"/>

6. Are you the beneficiary of a trust?

☐ Yes ☐ No If yes, attach a copy of the most recent Form 1041 or 4970

Established by	<input type="text"/>
Year	<input type="text"/>
Type of Trust	<input type="text"/>
Total Value	\$ <input type="text"/>
Annual Income	\$ <input type="text"/>
Terms of Distribution	<input type="text"/>

## Family Information

7. Are your parents separated or divorced? ☐ Yes ☐ No

If yes, your custodial parent must complete the PROFILE and FAFSA. Your noncustodial parent must submit a Noncustodial PROFILE (NCPROFILE) through The College Board and a most recent tax return, all pages, schedules and W-2 forms to Student Financial Services. Please be sure to include a Cover Sheet/Tax I.D. Form, available on our website.

<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Noncustodial Parent	Date of Separation	Date of Divorce
Address <input type="text"/>	<input type="text"/>	<input type="text"/>
Street	City	State Zip Code
Phone # <input type="text"/>	Email <input type="text"/>	
Employer/Occupation of Noncustodial Parent	<input type="text"/>	

Is your Custodial Parent remarried? ☐ Yes ☐ No If so, when?

Is your Noncustodial Parent remarried? ☐ Yes ☐ No If so, when?

**8. Child support and alimony:**

	Received in 2017	Paid in 2017
Child support for all children	\$ <input type="text"/>	\$ <input type="text"/>
Child support for student applicant	\$ <input type="text"/>	\$ <input type="text"/>
Alimony	\$ <input type="text"/>	\$ <input type="text"/>

**9. List those in your household who will be supported by your parent(s) in 2018-2019.**

Include your parent(s) (or your custodial parent if divorced/separated), your (step) brothers and (step) sisters, and other relatives.

**a.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2017-18	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

Type of Institution 2018-2019

☐ Public ☐ Full-Time

☐ Private ☐ Part-Time

☐ Undergraduate ☐ Graduate

**b.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2017-18	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

Type of Institution 2018-2019

☐ Public ☐ Full-Time

☐ Private ☐ Part-Time

☐ Undergraduate ☐ Graduate

**c.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2017-18	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

Type of Institution 2018-2019

☐ Public ☐ Full-Time

☐ Private ☐ Part-Time

☐ Undergraduate ☐ Graduate

**d.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2017-18	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

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☐ Public ☐ Full-Time

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**e.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2017-18	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

Type of Institution 2018-2019

☐ Public ☐ Full-Time

☐ Private ☐ Part-Time

☐ Undergraduate ☐ Graduate

**f.**   ☐ Check if living with family

Name Age

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name of Present School or College 2017-18	Year in School 2017-18	Tuition and Fees 2017-18	Room and Board 2017-18	Scholarships or Gift Aid 2018-19	Parental Support Toward Tuition 2017-18	Name of Institution to be Attended 2018-19

Type of Institution 2018-2019

☐ Public ☐ Full-Time

☐ Private ☐ Part-Time

☐ Undergraduate ☐ Graduate

## Parent Financial Information

### 10. From the list below, provide the income received from these sources:

	2016	2017	Estimated 2018
Disability Benefits or Worker's Compensation	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Deferred Compensation	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Housing/Living Allowances (clergy, military, etc.)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Pension/IRA	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Social Security:			
Parent(s) <input type="checkbox"/> disability <input type="checkbox"/> retirement	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Student applicant	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Other children <input type="text"/> (# of children receiving benefit)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Other <input type="text"/> Specify	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

### 11. Taxes paid in 2016 (if you itemize, refer to your 1040 Schedule A):

State and local taxes \$

Real estate taxes \$

### 12. Real estate owned (do **NOT** include your primary home). Attach additional pages if necessary.

Date of purchase <input type="text"/>	Purchase price \$ <input type="text"/>	Current value \$ <input type="text"/>	Current debt \$ <input type="text"/>
Date of purchase <input type="text"/>	Purchase price \$ <input type="text"/>	Current value \$ <input type="text"/>	Current debt \$ <input type="text"/>

### 13. Does either parent hold an interest in:

- A. a corporation ☐ Yes ☐ No
- B. a partnership ☐ Yes ☐ No
- C. a farm ☐ Yes ☐ No
- D. a Schedule C Business ☐ Yes ☐ No

If the answer to **A** is yes, submit your most recently completed IRS Form 1120 or 1120S, including all schedules and K-1's, to the fax number or email address on page 4. If the answer to **B** is yes, submit your most recently completed IRS form 1065, including all K-1's. If the answer to **C or D** is yes, submit your most recently completed tax returns, all pages, schedules using one of the 3 methods listed on page 6.

For ALL businesses (attach additional pages if necessary)

Name of Business	Year Entered Business	Current Total Net Value	Percent of Ownership
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>
<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>

**14. Parental Debt:**

	Current Amount Owed	Monthly Payment	# of Remaining Payments
First mortgage	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Second mortgage	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Reason for borrowing, second mortgage	<input type="text"/>		
Higher Education			
For parent(s) education (do not include sibling(s) <i>student</i> loans)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
Name of Siblings	<input type="text"/>		
Other <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
(please specify)			

**15. (Optional) We encourage you and your parents to explain any extraordinary financial circumstances that may have a bearing on your financial aid application. You may attach an additional page if necessary (please include your name).**

## 17. Signatures

I have reviewed the information on this financial aid application and declare it to be complete and accurate.

Parent's Signature \_\_\_\_\_ date \_\_\_\_\_

Parent's Signature \_\_\_\_\_ date \_\_\_\_\_

I hereby grant permission for Student Financial Services to release my academic transcript and information about my financial aid to any prospective scholarship donor.

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

## HOW TO SUBMIT YOUR COMPLETED APPLICATION

**Submit Forms to Student Financial Services by 1 of these 3 methods - Do not send duplicate forms.**

### 1 Submit Electronically (Preferred Method)

Submit the completed and signed Application and Tax I.D. Coversheet to:

<https://www.sfs.upenn.edu/forms/OnlineDocSubmitForm.php>

### 2 Paper / Fax

- 1) Print, complete and sign the Application and Tax I.D. Coversheet.
- 2) Fax completed Application and Tax I.D. Coversheet to **215-573-5428**  
(Be sure to fax both sides of 2-sided documents).

### 3 Paper / Mail

- 1) Print, complete and sign the Application and Tax I.D. Coversheet
- 2) Mail the completed Application and Tax I.D. Coversheet to this address:

Student Financial Services  
University of Pennsylvania  
005 Franklin Building  
3451 Walnut Street  
Philadelphia, PA 19104-6270

**!** Always complete and submit a **Tax I.D. Coversheet** whenever you submit forms to SFS.