



UCSC Student's ID /Account Number (Do not use CRUZ ID)

UCSC Student's Last Name

First Name

2012-2013 Tax Extension Packet for Independent Student

You have indicated that you have filed an extension to file your 2011 federal tax return. Please submit the IRS documents listed below. Priority Due Date: June 15, 2012.

- 2010 Federal IRS Tax Return
2011 W-2 and/or 1099 Forms
Copy of IRS Extension
This Completed Form

INCOME INFORMATION

Income for the twelve (12) month period of January 1, 2011 through December 31, 2011.

Wages earned from work by student
Wages earned from work by spouse

Check here if you received subsidized low-income housing such as HUD, Section 8, food stamps and/or TANF (do not include below).

Table with columns for TAXABLE INCOME, Spouse, and UNTAXED INCOME, Spouse. Rows include Interest & dividend income, Alimony, Business income, etc.

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UCSC Student's Last Name

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First Name

### SAVINGS, INVESTMENTS AND OTHER ASSETS ON THE DATE THE FAFSA WAS FILED

Note: Investments **do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRA's, Keogh plans, etc.)**

	STUDENT	SPOUSE
<b>Cash, Savings and Checking Accounts</b>	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Trust Funds	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
UGMA/UTMA Accounts	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Money Market	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Mutual Funds	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Certificates of Deposit	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Stock	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Stock Options	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Bonds, other securities	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Installment and Land Sale Contracts	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Other (specify) _____	\$ <u>Do Not Leave Blank</u>	\$ <u>Do Not Leave Blank</u>
Educational Benefits	\$ <u>Do Not Leave Blank</u>	\$ <u>N/A</u>
Educational Savings Accounts	\$ <u>Do Not Leave Blank</u>	\$ <u>N/A</u>
529 College Savings Accounts for all family members	\$ <u>Do Not Leave Blank</u>	\$ <u>N/A</u>
Refund Value of 529 Prepaid Tuition Plans	\$ <u>Do Not Leave Blank</u>	\$ <u>N/A</u>

*For Office Use Only*

Total Investments \_\_\_\_\_

### REAL ESTATE INVESTMENTS

Do you own real estate investments excluding the home you live in?  Yes  No If yes, provide details below.

Complete this information for all real estate you own other than the home you live in such as mobile homes, condos, duplexes, rental property, land, summer homes, etc. as of the date the 2012-13 FAFSA was filed.

If you have additional properties, attach a separate sheet with required information.

**Property 1** (Do not report the home you live in):

Current Market Value\* \$ \_\_\_\_\_ Mortgage Balance \$ \_\_\_\_\_ Purchase Price \$ \_\_\_\_\_ Year Acquired \_\_\_\_\_

Property Address \_\_\_\_\_  
Street address City State Zip Code

Complete this section if you **RENTED OUT A PORTION OF THE HOME YOU LIVE IN** that meets the following criteria: the rental unit has its own entry and includes a kitchen and bath. The portion of your home that generates rental income is considered an asset and must be reported as an investment net worth on the FAFSA. Complete the following information about the home you live in:

Current Market Value\* \$ \_\_\_\_\_ Mortgage Balance \$ \_\_\_\_\_ Purchase Price \$ \_\_\_\_\_ Year Acquired \_\_\_\_\_

Rental Square Footage \_\_\_\_\_ + Home Square Footage \_\_\_\_\_ = Total Dwelling Square Footage \_\_\_\_\_

\*on the date you filed the FAFSA

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Total Current Market Value \_\_\_\_\_ – Total Mortgage Balance \_\_\_\_\_ = Real Estate Net Worth \_\_\_\_\_

Total Investments \_\_\_\_\_ + Real Estate Net Worth \_\_\_\_\_ = Total Investment Net Worth \_\_\_\_\_

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### STUDENT HOUSEHOLD INFORMATION

List the people in your household. Include yourself and spouse if married. Include your children if (a) you provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. List any other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2012 through June 30, 2013. If you have additional people to list, attach a separate sheet of paper with the required information.

	Full Name of Family Member in Household	Date of Birth MM/DD/YY	Age	Relationship to Student	Social Security Number	Name of College (if attending in 2012-2013)	For those enrolled in college for 2012-13, list current degree objective.*
UCSC Student				self		UCSC	
Spouse							
Other Members in Household							

\*AA, BA, BS, Certificate, MA, PhD, MD, DDS

Total number of member(s) listed above who will attend UCSC in 2012-2013:

In 2010 or 2011, did you receive federal low-income housing such as HUD or Section 8?  Yes  No

### CERTIFICATION

- I hereby declare that all information reported on this document is true, complete, and accurate to the best of my knowledge.
- I understand that any false statement or misrepresentation will be cause for denial, reduction, cancellation and/or repayment of financial aid.
- This document must be received no later than June 15, 2012 to meet the priority deadline for all types of financial aid.
- I understand that verifications of enrollment will be required if family members are listed in college.

Please check your marital status as of the date you submitted the 2012-2013 FAFSA application. Please provide the month and year you were married, separated, divorced, widowed, or a California Registered Domestic Partner in the box next to your selection.

Single

Divorced       
Month Year

Separated       
Month Year

Married/Remarried        
Month Year

Widowed       
Month Year

California Registered Domestic Partner       
Month Year

Student Daytime Phone ( \_\_\_\_\_ ) \_\_\_\_\_ Student E-mail Address \_\_\_\_\_

Student Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_