

## ASSET Student Financial Aid Application 2020-2021

Student Name: \_\_\_\_\_

Student ID: \_\_\_\_\_

Eligible students under the Colorado ASSET bill may be considered for institutional financial aid at Regis University. To be considered, you must complete this application and provide all of the requested documentation. ASSET students should NOT complete the online FAFSA application to be considered for institutional aid at Regis University.

**Do not leave any fields blank. Please write '0' or 'NA' if not applicable.**

### Student Demographics

1. What is your marital status as of today?

- Single  
 Married/Remarried: Month/Year \_\_\_\_\_  
 Separated/Divorced: Month/Year \_\_\_\_\_

2. Are you working towards your 1<sup>st</sup> Bachelor's Degree Program?

- Yes  
 No

### Student (and Spouse) Income

1. For 2018, have you (the student) completed your income tax return?

I have completed my income tax return

\*\*Please attach a copy of your tax return to this application

I am not going to file

### Student 2017 Additional Financial Information (Enter combined amounts for you and your spouse)

1. Child support paid because of divorce or separation (don't include support for children in your household):

\$ \_\_\_\_\_

2. Taxable earnings from Federal Work-Study and need-based employment portions of fellowships and assistantships:

\$ \_\_\_\_\_

3. Combat pay or special combat pay:

\$ \_\_\_\_\_

**Student 2017 Untaxed Income (Enter combined amounts for you and your spouse)**

1. 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): \$ \_\_\_\_\_
2. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040: \$ \_\_\_\_\_
3. Child support received for any of your children. Don't include foster care or adoption payments: \$ \_\_\_\_\_
4. Tax exempt interest income from IRS Form 1040: \$ \_\_\_\_\_
5. Untaxed portions of IRA distributions from IRS Form 1040. Exclude rollovers. If negative, enter a zero here: \$ \_\_\_\_\_
6. Untaxed portions of pensions from IRS Form 1040. Exclude rollovers. If negative, enter a zero here: \$ \_\_\_\_\_
7. 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: \$ \_\_\_\_\_
8. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances: \$ \_\_\_\_\_
9. Other untaxed income not reported above, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, 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 for federal tax on special fuels \$ \_\_\_\_\_
10. 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: \$ \_\_\_\_\_

## Student and Spouse Asset Information

### 1. Assets

Cash, savings and checking (as of today) \$ \_\_\_\_\_  
Net worth of investments\* (as of today) \$ \_\_\_\_\_  
Net worth of business (as of today) \$ \_\_\_\_\_  
Net worth of investment farm (do not include farm you live on) (as of today) \$ \_\_\_\_\_

\* Net worth is value minus debt. Investments include other real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, education IRA's, installment & land sale contracts (including mortgages held), commodities, etc.

## Dependency

1. If you qualify for any of the categories below, please select an option. If you do not qualify for any of these categories below, **please provide parental information** in the following section:

- Born before January 1, 1997
- Enrolled in a Graduate or Professional Degree Program
- Have Children you support
- Have dependents other than children you support
- You are an orphan/ward of the court
- You are an unaccompanied youth at risk of homelessness as determined by HUD or your school

## Parent Demographics

Include information for:

- Both biological parents if they are married or are unmarried and living together, otherwise;
- The biological parent with whom you have lived with the most during the last 12 months, otherwise;
- The biological parent that supports you the most, for single parent households;

1. Parent One Name: \_\_\_\_\_ Date of Birth\_\_  
\_\_\_\_\_ First, Last  
MM/DD/YYYY

2. Parent Two Name: \_\_\_\_\_ Date of Birth\_\_  
\_\_\_\_\_ First, Last  
MM/DD/YYYY

3. What is your (parent) marital status as of today?

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Never been married                                  | <input type="checkbox"/> Married or remarried | Month/Year you were married,<br>remarried, separated, divorced,<br>widowed _____/_____ |
| <input type="checkbox"/> Unmarried and both legal<br>parents living together | <input type="checkbox"/> Separated            |  |
|  | <input type="checkbox"/> Divorced or widowed  |  |

4. What is the highest level of school completed by Parent 1?

- Middle school/Jr. high       High School       College or beyond       Other/unknown

5. What is the highest level of school completed by Parent 2?

- Middle school/Jr. high       High School       College or beyond       Other/unknown

## Parent Household Size

1. How many people are in your parents' household? \_\_\_\_\_  
Include:
  - Yourself (the student), even if you don't live with your parents,
  - Your parents,
  - Your parents' other children (even if they do not live with your parents) if (a) your parents will provide more than half of their support between July 1, 2020 and June 30, 2021 or (b) the children do not qualify for any category listed in question 27 above, and
  - Other people if they now live with your parents, your parents provide more than half of their support and your parents will continue to provide more than half of their support between July 1, 2020 and June 30, 2021.
2. How many people in your parents' household (from question above) will be college students between July 1, 2020 and June 30, 2021? \_\_\_\_\_  
*Always count yourself as a college student. Do not include your parents. Do not include siblings who are in U.S. military service academies. You may include others only if they will attend, at least half-time in 2020-2021 a program that leads to a college degree or certificate.*

## Parent (and Spouse) Income

1. For 2018, have you (the Parent) completed your income tax return?  
 I have completed my tax return  
\*\*\*Please attach a copy of your 2018 tax return  
 I'm not going to file

## Student 2017 Additional Financial Information (Enter combined amounts for you and your spouse)

1. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040:  
\$ \_\_\_\_\_
2. 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.  
\$ \_\_\_\_\_
3. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.  
\$ \_\_\_\_\_
4. 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.  
\$ \_\_\_\_\_
5. Earnings from work under a cooperative education program offered by a college.  
\$ \_\_\_\_\_

**Parent 2017 Untaxed Income (Enter combined amounts for you and your spouse)**

- 6. 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).
- 7. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040.
- 8. Child support received for any of your children. Don't include foster care or adoption payments.
- 9. Tax exempt interest income from IRS Form 1040—line 8b or 1040A—line 8b.
- 10. Untaxed portions of IRA distributions from IRS Form 1040 Exclude rollovers. If negative, enter a zero here.
- 11. Untaxed portions of pensions from IRS Form 1040. Exclude rollovers. If negative, enter a zero here.
- 12. 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.
- 13. Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
- 14. Other untaxed income not reported above, such as workers' compensation, disability benefits, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040. Don't include extended foster care benefits, student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, 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 for federal tax on special fuels.
- 15. 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.

**Parent Asset Information**

16. Assets

Cash, savings and checking (as of today) Net	\$ _____
worth of investments* (as of today) Net	\$ _____
worth of business (as of today)	\$ _____
Net worth of investment farm (do not include farm you live on) (as of today)	\$ _____

\* Net worth is value minus debt. Investments include other real estate (do not include the home you live in), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, education IRA's, installment & land sale contracts (including mortgages held), commodities, etc.

## Signatures

By signing this form, I certify that all the information provided is complete and accurate.

\_\_\_\_\_  
Student signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Parent signature

\_\_\_\_\_  
Date

**Electronic and typed signatures are not acceptable.**

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