

SCHOLARSHIP APPLICATION

SCHOLARSHIPS

Partial scholarships are available based on academic merit and financial need.

SCHOLARSHIP APPLICATION DEADLINE

Scholarship applications are due in the office of UCSB Extension no later than May 1, 2009. Applications can be submitted by mail:

UCSB Extension
Attn: L. Kronvall
Mail Code 1110
University of California,
Santa Barbara
Santa Barbara, CA
93106-1110
or fax (Attn. L. Kronvall):
(805) 893-4943

Award letters issued
May 15, 2009.

➤ **Name** (first, m.i, last) _____

➤ Social Security # - - Perm # (UCSB Grads only) _____

Permanent Address (all correspondence will be sent to this address) _____

Phone _____ Fax _____

E-Mail Address _____

Date of Birth | | | - | | | - | | | | Year Graduated from College GPA

Current Employer Employer Phone # _____

Employer Address _____

➤ **Student's Family Members** Family size: how many members are in your family, including yourself? _____

Name	Age	Relationship	Currently Attending College?		
_____	_____	_____	<input type="checkbox"/> No	<input type="checkbox"/> Full time	<input type="checkbox"/> Half time
_____	_____	_____	<input type="checkbox"/> No	<input type="checkbox"/> Full time	<input type="checkbox"/> Half time
_____	_____	_____	<input type="checkbox"/> No	<input type="checkbox"/> Full time	<input type="checkbox"/> Half time
_____	_____	_____	<input type="checkbox"/> No	<input type="checkbox"/> Full time	<input type="checkbox"/> Half time

Parents' marital status: married divorced separated single widowed

➤ **Student Dependency Status**

- **INDEPENDENT STUDENT:** If ONE OR MORE of the following conditions apply, the student is considered independent.
- **DEPENDENT STUDENT:** If NONE of these conditions apply, then the student is considered to be dependent, and parental information is used to determine financial aid eligibility.

Please indicate if any of the following conditions apply to the student.

- Yes No 1. Was the student born BEFORE January 1, 1986?
- Yes No 2. Is the student an orphan or a ward of the court, or is the student an emancipated minor?
- Yes No 3. When the student was 13 or older, were both of the student's parents deceased, was the student in foster care, or was the student a dependent/ward of the court?
- Yes No 4. At any time on or after July 1, 2008 did the student receive an official determination that the student is an unaccompanied youth who is homeless or at risk of being homeless?
- Yes No 5. Is the student a veteran of the U.S. Armed Forces, or will be a veteran as of June 30, 2010, or is the student currently serving on active duty?
- Yes No 6. Is the student currently married?
- Yes No 7. Will the student be working on a degree beyond a bachelor's degree in school year 2009-2010?
- Yes No 8. Does the student have dependents (other than his or her spouse) that he or she supports?

If you answered YES to any of the questions, please complete the **Independent Student Worksheet** on page 3.

- **Student must submit copies of W-2 and 1040 forms for most recently filed taxes.**

If you answered NO to all of the above questions, please complete the **Dependent Student Worksheet** on page 2.

- **Student must submit copies of W-2 and 1040 forms for most recently filed taxes for themselves and parents.**

Dependent Student

Please include copies of W-2 and 1040 forms for most recently filed taxes for student and parents. Copies must be provided for scholarship application to be considered.

2008 Income	Parents' Information	Student's Information
Adjusted Gross Income	\$	\$
Earnings from Work	Parent 1 \$ _____ Parent 2 \$ _____	\$
Untaxed income/benefits	\$	\$
Parents' social security benefits received for all family members except the student	\$	
Student's social security benefits		\$
Medical spending accounts	\$	
Child support paid	\$	
Hope Tax Credit *	\$	\$
Student work study earnings/financial aid		\$
Receive Federal Means-Tested Benefits? *	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
Dislocated Worker? *	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no

Allowances

U.S. income taxes paid *	\$	\$
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Assets

Cash, savings and checking (enter total value of all accounts)	\$	\$
Other real estate and investments (but NOT your home) *	\$	\$
Business equity *	\$	\$
Do you have more than 100 FTE employees?	<input type="checkbox"/> yes <input type="checkbox"/> no	<input type="checkbox"/> yes <input type="checkbox"/> no
Farm equity *	\$	\$
Do you live on the farm?	<input type="checkbox"/> Yes <input type="checkbox"/> No	

*See page 4

Independent Student

Please include copies of W-2 and 1040 forms for most recently filed taxes. Copies must be provided for scholarship application to be considered.

STUDENT'S INFORMATION

2008 Income

Adjusted gross income		\$
Student's earnings from work		\$
Untaxed income/benefits		\$
Student's social security benefits		\$
Child support paid		\$
Hope Tax Credit *		\$
Student work study earnings/financial aid		\$
Receive Federal Means-Tested Benefits? *	<input type="checkbox"/> yes	<input type="checkbox"/> no
Dislocated Worker? *	<input type="checkbox"/> yes	<input type="checkbox"/> no

Allowances

U.S. income taxes paid *	\$
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Assets

Cash, savings and checking (enter total value of all accounts)	\$
Other real estate and investments (but NOT your home)	\$
Business equity *	\$
Do you have more than 100 FTE employees?	<input type="checkbox"/> yes <input type="checkbox"/> no
Farm equity *	\$
Do you live on the farm?	<input type="checkbox"/> Yes <input type="checkbox"/> No

*See page 4

Report the Hope or Lifetime Learning Tax Credit claimed on the parent's income tax form.

- **Hope Tax Credit:** A family may claim a tax credit of up to \$1,650 per year for each eligible family member enrolled at least half-time in the first two years of undergraduate study. The amount of the credit depends in part on the family's income and is based on the qualified tuition and fee expenses paid by the taxpayer.
- **Lifetime Learning Tax Credit:** A family may claim a tax credit of up to \$2,000 per year for all eligible family members. To be eligible, the student must be claimed by the taxpayer, and must be taking courses at an eligible school, but does not necessarily have to be enrolled in a degree program or enrolled half-time.

Receive Federal Means-Tested Benefits

If the student, or the parent, or anyone living in the parents' household received any of these benefits in 2008, please answer "Yes" to the question. If none of these benefits were received, please answer "No":

- Supplemental Security Income Program (SSI)
- Food Stamp Program
- Free or Reduced Price School Lunch Program
- Temporary Assistance to Needy Families
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

Dislocated Worker

You may be considered a dislocated worker if you meet one of the following conditions:

- You have been terminated, laid off, or received a "notice of termination or layoff" and are unlikely to return to your usual occupation or industry because of:
 - A permanent plant closure, or
 - A substantial layoff, or
 - Foreign competition, or
 - Lack of demand for your job skills.
- You are self-employed, but are unemployed due to economic conditions or a natural disaster.
- You are a displaced homemaker who previously provided unpaid services to the family (e.g., stay at home mom or dad), are no longer supported by your husband or wife, are either unemployed or working a job that does not support the household, and are having trouble finding or upgrading employment.

Note: The financial aid administrator at your college or program may require you to provide proof that you are a dislocated worker in order to award you state or federal funds.

US Income Taxes Paid

IRS Form 1040, line 56 or 1040A, line 37, or Form 1040EZ, line 10. Don't copy the amount of "federal income tax withheld" from a W-2 form. Also, make sure this amount does not include any FICA, self-employment, or other taxes from Form 1040. (If the student's parents are not married and filed a joint return, only report the portion of taxes that relates to the wages for parent with whom the student is living.)

Other Real Estate Investments (but NOT your home)

First, determine the value of the other real estate and the amount they are worth today. For investments, include trust funds, stock options, savings bonds, mutual funds, money market accounts, certificates of deposit, Coverdell Education Savings accounts, college savings plans and prepaid tuition plans (both for the student and siblings), commodities, precious and strategic metals, installment and landsale contracts, and any other investments. Then, determine how much is owed, including mortgages and related debts. Don't include interest due. To calculate the equity for other real estate and investments, subtract the debt from the value.

Business Equity

If student's parents (or student, if owner) own a business, report the calculated equity. To determine the value, include the value of land, buildings, machinery, equipment, inventories, etc. Then, subtract the business debt. To determine the debt, include only the present mortgage and related debts for which the business was used as collateral. If the student's parents (or student, if owner) are not the sole owners, write in only the parents' share of the total equity.

Farm Equity

If student's parents (or student, if owner) own a farm, report the calculated equity. To determine the value, include the value of land, buildings, machinery, equipment, livestock, inventories, etc. Don't include the home if it is part of the farm. To determine the debt, include only the present mortgage and related debts for which the farm was used as collateral. If the student's parents (or student, if owner) are not the sole owners, write in only the parents' share of the total equity.

Additional questions

1. Do you have a pending offer or have you accepted a job offer from a firm? Yes No
2. If yes, what is the name of the firm? _____
3. If yes, is the firm going to pay for you to attend the program, or reimburse you to attend? Yes No
4. If yes, how much is the firm going to pay for you to attend the program, or reimburse you to attend? \$ _____
5. If, based on the results you do not qualify for a scholarship, are there extenuating circumstances that should otherwise qualify you to receive a scholarship?
Please explain:
