

FINANCIAL AID AND SCHOLARSHIPS

UNIVERSITY of CALIFORNIA • IRVINE

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2012-13 Domestic Partnership Status for Students

Name _____ UCI ID Number _____

Domestic Partnerships

The California Domestic Partner Rights and Responsibilities Act of 2003 extends rights, benefits and obligations to individuals in Registered Domestic Partnerships, effective January 1, 2005. This may impact your eligibility for state and university financial aid only. You must complete the attached form and return it to our office in order to be considered for such aid including Cal Grant, UC Irvine Grant and University Loan. This does not impact your current eligibility for federal student aid (i.e. Pell Grant, Perkins Loan, Direct Loan).

Federal Aid –

- Your eligibility for federal financial aid is not based on your status as a Registered Domestic Partner.
- You must complete the Free Application for Federal Student Aid (FAFSA) using only your information.
- If you are a dependent student you must complete Step Four (Parent’s Information) and have a parent sign the form.
- If you are an independent student you must complete the FAFSA using *only your* information.

State/University Aid -

- If you are in a Registered Domestic Partnership you must provide information regarding your partner for state and university financial aid purposes. This is in addition to your FAFSA information already submitted for federal aid.
- A copy of the Declaration of Domestic Partnership or Certificate of Domestic Partnership issued by the Secretary of State must be submitted with this form.
- If the partnership is recognized outside of the state of California documentation from the issuing state must be submitted.
- In addition to the submission of the Declaration or Certificate, the attached form must be must be completed, including the signature of your partner.
- If you are a dependent student, your application for state and university financial aid will be revised to reflect your and your partner’s information only (your parent’s information will not be used for state/university aid eligibility).

The information collected on the attached form is used only to determine your financial aid eligibility for state and university funds. Information is collected and retained only by the UCI Office of Financial Aid and Scholarships and is subject to FERPA and university privacy policies.

2012-13 Domestic Partnership Status - Student

Student Name: _____
(print) Last, First, Middle Initial

UCI ID Number _____

Complete these questions using your partner's information that is not currently included on your FAFSA. Report only information that has not been reported on the FAFSA. Make sure the form is signed by both the partner and student.

1. Partner Name: _____
Last First
2. Month and year partnership was established: _____ / _____
3. How many people are in your household? _____
4. How many people in your household will be college students between July 1, 2012 and June 30, 2013? _____
5. For 2011, has your partner completed their IRS income tax return or another tax return listed in question 6?
 _____ My partner has already completed their return.
 _____ My partner will file, but they have not yet completed their return.
 _____ My partner is not going to file. Skip question 6.
6. What income tax return did your partner file or will they file for 2011?
 _____ IRS 1040 _____ IRA 1040A, 1040EZ _____ A foreign tax return
 _____ A tax return with Puerto Rico, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau.
7. If your partner filed or will file a 1040, were they eligible to file a 1040A or 1040EZ? Yes No Don't Know
8. Did your parent receive benefits from any of the following federal programs in 2011?
 Supplemental Security Income (SSI) Program (indicate SSI amount received in Section IV below)
 Food Stamp Program
 Free or Reduced Price School Lunch Program
 Temporary Assistance for Needy Families (TANF) (indicate TANF amount received in Section IV below)
 Special Supplemental Nutrition Program for Women, Infants & Children (WIC)
9. What was your partner's adjusted gross income for 2011? \$ _____
Adjusted gross income is on IRS Form 1040 – line 37; 1040A – line 21; 1040EZ – line 4.
10. Enter the total amount of your partner's income tax for 2011. \$ _____
Income tax amount is on IRS Form 1040 – line 61; 1040A – line 35; 1040EZ – line 10.
11. Enter your partner's exemptions for 2011. _____
Exemptions are on IRS Form 1040 or 1040 A – Line 6d; 1040EZ see the FAFSA instructions, page 2
13. How much did your partner earn from working (wages, salaries, tips, etc) in 2011? Answer this question whether or not your partner completed a tax return. \$ _____
14. As of the day the FAFSA was completed, what was the total balance of cash, savings and checking accounts? \$ _____
15. As of the day the FAFSA was completed, what was the net worth of the partner's investments, including real estate (not the family home)? Net worth means current value minus debt.* \$ _____
16. As of the day the FAFSA was completed, what was the net worth of the partner's current business and/or investment farms? Do not include a farm that the family live on and operate. \$ _____

* Refer to page 3 of the FAFSA for further directions and information.

Worksheet A - Report Annual Amounts	
Earned income credit from IRS Form 1040 – line 64a; 1040A – line 38a; 1040EZ – line 8a.	\$
Additional child tax credit from IRS Form 1040 – line 65 or 1040A – line 39.	\$
Welfare benefits, including Temporary Assistance for Needy Families (TANF). Don't include food stamps, subsidized housing or WIC.	\$
Social Security benefits received, for all household members not already reported on the FAFSA, that were not taxed, including SSI.	\$
TOTAL	\$

Worksheet B - Report Annual Amounts	
Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 Form in boxes 12a through 12d, codes D, E, F, G, H and S	\$
IRA deductions and payments to self-employed SEP, SIMPLE, KEOGH and other qualified plans from IRS Form 1040 – total of lines 28 + 32 or 1040A – line 17	\$
Child support received for all children. Don't include foster care or adoption payments.	\$
Tax exempt interest income from IRS Form 1040 – line 8b or 1040A – line 8b	\$
Foreign income exclusion from IRS Form 2555 – line 45 or 2555EZ – line 18	\$
Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). Exclude rollovers. If negative, enter zero here.	\$
Credit for federal tax on special fuels from IRS Form 4136 – line 17 (non-farmers only)	\$
Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$
Veteran's non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances	\$
Any other untaxed income or benefits not reported elsewhere on Worksheets A and B, such as worker's compensation, untaxed portions of railroad retirement benefits, Black Lung Benefits, disability, etc. Tax filers only: report combat pay not included in AGI. Don't include student aid, Workforce Investment Act educational benefits, or benefits from flexible spending arrangements (e.g., cafeteria plans).	\$
Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$
TOTAL	\$

Worksheet C - Report Annual Amounts	
Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 49 or 1040A – line 31	\$
Child support you paid because of divorce or separation or as a result of a legal requirement. Don't include support for your children in your household.	\$
Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$
Student grant and scholarship aid reported to the IRS in your adjusted gross income. Include AmeriCorps benefits (awards, living allowance and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$
TOTAL	\$

Partner Signature _____

Date _____

Student Signature _____

Date _____