



Butler University
Office of Financial Aid

Preliminary Analysis of Family Responsibility
2010-2011 academic year

Butler University – Office of Financial Aid

2010-2011 Preliminary Analysis of Family Responsibility

Butler University has developed the Preliminary Analysis of Family Responsibility worksheet in order to help families determine their eligibility for financial assistance prior to the official student aid application process. By completing this worksheet, you are asking us to provide you with an estimate of the financial responsibility expected from your family resources for the 2010-2011 academic year. Along with this estimate, we will also give you additional information about financing options available at Butler.

This is not an official application for financial aid at Butler University and does not guarantee you will receive financial aid. The formal application process consists of you submitting the Free Application for Federal Student Aid (FAFSA) between January 1, 2010 and March 1, 2010. Because our estimate can only be as accurate as the information you provide, please answer the questions to the best of your ability. The Preliminary Analysis Worksheet will not be processed if received after February 1, 2010. We encourage all families to submit the actual 2010-2011 Free Application for Federal Student Aid (FAFSA) at that time.

Notes for Completing the Preliminary Analysis Worksheet

Section B: Household Information

Determining the responsible parent(s) - “Parents” on this form refers to the parents who are part of the household in which you live. Below we have outlined the guidelines to help you determine whose information is to be included on this form.

- Your parents are both living and married to each other. Answer questions on the form about them.
- Your parent is widowed or single. Answer the questions on the form about only that parent.
- Your parents have divorced or separated. Answer the questions on the form about the parent you lived with the most in the last 12 months. If you did not live with one parent more than the other, answer in terms of the parent who provided the most financial support during the last calendar year. *If this parent is remarried as of today, answer the questions about that parent and the person to whom your parent is married (your stepparent – stepfather or stepmother).*

Attending college? – Select “yes” for family members, other than parents, if they will attend college at least half-time in 2010-2011 in a program that leads to a college degree or certificate.

Section C: Estimated 2009 Income and Benefits

Other untaxed income - Items not on the 1040 may include, but are not limited to, a pre-tax retirement contribution, deductible IRA or Keogh contribution, untaxed pensions, workers compensation, veterans non-educational benefits, housing and other allowances available to military or clergy personnel. Do not include any income obtained from food stamps, Social Security benefits, veterans or vocational rehabilitation educational benefits, or “rollover” pension funds.

Section D: Assets

Indicate the current market value of assets. If assets are held jointly by separated or divorced parents, indicate the market value attributed to the custodial parent. Investments include real estate, trust funds, UGMA and UTMA accounts, money market funds, mutual funds, certificates of deposit, stocks, stock options, bonds, other securities, installment and land sale contracts (including mortgages held), commodities, etc. **Investments also include** qualified educational benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans. **Investments do not include** the home you live in, and the value of life insurance and retirement plans.

Section A: Student's Information

Name _____ (last) _____ (first)

SAT score _____ / _____ (math) (critical reading) ACT score _____ (composite)

Class Rank _____ Class Size _____ High School _____

Section B: Household Information

*Parent's current marital status single married/remarried divorced or separated widowed

Family Members (include parents, siblings, etc.):

Name	Age	Relationship to student	Attending college?*	
			(2010-2011)	
_____	_____	_____	No	Yes
_____	_____	_____	No	Yes
_____	_____	_____	No	Yes
_____	_____	_____	No	Yes
_____	_____	_____	No	Yes

*See Notes for Completing the Preliminary Analysis Worksheet on page 2 for further information and explanation.

Section C: Estimated 2009 Income and Benefits

Do not leave any question blank, the form will be returned for complete information. If the answer is zero or the question does not apply, please answer with a '0'.

	Parent (s)	Student
2009 Estimated adjusted gross income (AGI)	\$ _____	\$ _____
2009 Estimated earnings from work (wages)	\$ _____ father*	\$ _____
2009 Estimated earnings from work (wages)	\$ _____ mother*	_____
2009 Estimated child support received for all	\$ _____	\$ _____
2009 Estimated contributions to tax deferred retirement	\$ _____	\$ _____
2009 Estimated all other untaxed income*	\$ _____	\$ _____
2009 Estimated federal income tax paid	\$ _____	\$ _____

*See Notes for Completing the Preliminary Analysis Worksheet on page 2 for further information and explanation.

Section D: Assets*

	Parent (s)	Student
Value of cash, savings and checking accounts	\$ _____	\$ _____

Report the current net worth of the following assets. Net worth is defined as the value minus debt.

Investments (exclude value of retirement accounts)	\$ _____	\$ _____
Real estate (do <u>not</u> include the value of your home)	\$ _____	\$ _____
Business (if you have more than 100 FT employees)	\$ _____	\$ _____
Farm (if you do <u>not</u> live on and operate)	\$ _____	\$ _____

*See *Notes for Completing the Preliminary Analysis Worksheet* on page 2 for further information and explanation.

If the expected total income and benefits for 2009 (section C) will differ from the 2008 total income and benefits reported on your federal income return (attached) by \$7,500 or more, please explain below.

Section E: Mailing Address

Street address _____

City _____ State _____ Zip _____

Parent's email _____ Daytime phone number _____

Preferred method of response from analysis: Send to mailing address Send to parent's email

Section F: Certification (required)

We certify the estimates provided are accurate to the best of our knowledge at this time. We understand the information to be provided after processing of this form is for estimation purposes only and does not replace the need to file the Free Application for Federal Student Aid (FAFSA) by March 1, 2010.

Student's signature _____ date _____

Parent's signature _____ date _____

Application provided by financial aid staff admissions JCFA faculty/staff coach

Name of Butler staff member _____

Section G: Mailing Instructions

- Attach a copy of the student and parents' 2008 federal income tax return.
- Mail or fax application and tax returns to –

Butler University Office of Financial Aid – 4600 Sunset Avenue – Indianapolis, IN 46208 – fax 317-940-8250

Questions? Call toll-free at 877-940-8200 or visit our website at www.butler.edu/financial-aid.