



**Think First. Type Second.** This worksheet allows you to read and complete questions before entering your information online. This is a good time for you to check with your school counselor or college advisor regarding any question or answer of which you may be unsure. The questions are listed in the same order that they appear online. For a list of SUNY campuses that accept this form, visit [www.suny.edu/attend/apply-to-suny/eop-financial](http://www.suny.edu/attend/apply-to-suny/eop-financial).

### Section 1. Login Information

Email Address: \_\_\_\_\_

Password: \_\_\_\_\_

### Section 2. Exceptions to Income Guidelines

Answer all of the questions below to help determine if you qualify for exclusion from the income eligibility guidelines.

Are you or your family primarily dependent on public assistance payments from Temporary Assistance to Needy Families (i.e. Family Assistance, Safety Net, cash grants received from public assistance)?  Yes  No

Are you in foster care as established by the court?  Yes  No

Are you a ward of the court or county?  Yes  No

If you answered **"Yes"** to either of the last two questions above, **skip to Section 8**.  
All others, **continue to Section 3**.

### Section 3. Dependency Status

Answer all of the questions below to help determine your dependency status.

Were you born before January 1, 1999?  Yes  No

As of today, are you married? (Also answer "yes" if you are separated, but not divorced.)  Yes  No

Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?  Yes  No

Are you a veteran of the U.S. Armed Forces?  Yes  No

Do you now have or will you have children who will receive more than half of their support from you between July 1, 2022 and June 30, 2023?  Yes  No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2023?  Yes  No

At any time since you turned age 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court?  Yes  No

As determined by a court in New York State, are you or were you an emancipated minor?  Yes  No

**Section 3. Dependency Status (continued)**

Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?  Yes  No

At any time on or after July 1, 2023, did your high school or school district homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?  Yes  No

At any time on or after July 1, 2023, did the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?  Yes  No

At any time on or after July 1, 2023, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless?  Yes  No

If you answered **“No”** to all of the questions above, your status is **“Dependent”** for the purposes of this form. Continue to Section 4. If you answered **“Yes”** to any of the questions above, your status is **“Independent”** for the purposes of this form. Skip to Section 5.

**Section 4. Parent Information - FOR DEPENDENT STUDENTS ONLY**

Dependent students must complete this section. Independent students should leave this section blank. For the purposes of this form, “legal parent” means your (biological or adoptive) parent, or a person that the state has determined to be your legal parent. Grandparents, foster parents, stepparents, legal guardians, widowed stepparents, aunts, uncles and siblings are not considered legal parents on this form unless they have legally adopted you.

What are the names of your legal parents (biological or adoptive)? If unknown, enter “unknown.” Legal Parent 1: \_\_\_\_\_  
Legal Parent 2: \_\_\_\_\_

What is the relationship of your legal parents to each other?  Married  Divorced/Separated  
 Not married and living together  Widowed  
 Never married

If your legal parents were married to each other at one time, provide the month and year they were married, separated, divorced or widowed to or from each other.  
\_\_\_\_\_  
Month Year  
\_\_\_\_\_  
Month Year

If your legal parents are married to each other, or are not married but living together, skip to the last question in this section.

If your legal parents are not married to each other and do not live together, which parent did you live with more during the past 12 months?  Legal Parent 1:  Legal Parent 2:  Neither Parent  
 Legal Parent 1:  Legal Parent 2:  Neither Parent

If you answered “Neither Parent” above, which parent provided more financial support during the past 12 months?  Legal Parent 1:  Legal Parent 2:  Neither Parent

Is the legal parent identified in either of the last two questions above currently married or remarried?  Yes  No

Provide the month and year that the parent identified above married or remarried.  
\_\_\_\_\_  
Month Year

Complete for special circumstances only:

If you did not live with your legal parents during the past 12 months due to special circumstances, with whom did you live?

\_\_\_\_\_  
Name Relationship to you

\_\_\_\_\_  
Name Relationship to you

## Section 5. Household Information

Provide the following information for all household members.

**Dependent Students:** Include yourself, the parent(s) with whom you live, your stepparent if applicable, their other dependent children (even if they do not live with you) if your parent(s) will provide more than half of their support between July 1, 2022 and June 30, 2023, and other people if they now live with you, your parent(s) provide more than half of their support and your parent(s) will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.

Note to students not living with a parent: Under very limited circumstances (for example, your parents are incarcerated; you have left home due to an abusive family environment; or you do not know where your parents are and are unable to contact them), you may be able to submit your SUNY EOP Financial Information Form without parental information. Contact the EOP Office at a campus to which you intend to apply for further instructions.

Independent Students: Include yourself, your spouse (if married), your children (if any) if you will provide half of their support between July 1, 2022 and June 30, 2023, even if they do not live with you, and other people if they now live with you, you provide more than half of their support and you will continue to provide more than half of their support between July 1, 2022 and June 30, 2023.

If there are more than 6 members in your household, attach a separate sheet providing the same information for each additional person in your household.

Name	Age	Relationship	Employed in 2020?	Wages and tips earned in 2020	Filed a 2020 federal tax return?	Dependent on the same income that supports you?
<u>Applicant</u>	___	<u>Self</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	___	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	___	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	___	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	___	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	___	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No	\$ _____	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Section 6. Additional Household Income

Report all additional income received in your household for the tax year 2020.

If the answer is 0 or the question does not apply to you, enter 0.

Dividends, interest, or other income from investments:	\$ _____
Rents paid to you:	\$ _____
Social Services/Public Assistance (TANF, etc):	\$ _____
Social Security benefits:	\$ _____
Supplemental Security Income (SSI):	\$ _____
Workers Compensation/Disability:	\$ _____
Pension/Annuity:	\$ _____
Unemployment:	\$ _____
Veterans Noneducation Benefits:	\$ _____
Alimony/Maintenance:	\$ _____
Child Support:	\$ _____
Other income, including 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 above and that is not part of a legal child support agreement (specify): _____	\$ _____

## Section 7. Household Assets

Report the current value of the following assets held by your household. Independent students are not required to report information regarding assets held by parents. If the answer is 0 or the question does not apply to you, enter 0.

Your cash, checking and savings accounts: \$ \_\_\_\_\_

Your investments (non-retirement): \$ \_\_\_\_\_

Your trust fund/settlement: \$ \_\_\_\_\_

Spouse's cash, checking and savings accounts: \$ \_\_\_\_\_

Spouse's investments (non-retirement): \$ \_\_\_\_\_

Spouse's trust fund/settlement: \$ \_\_\_\_\_

First parent's cash, checking and savings accounts: \$ \_\_\_\_\_

First parent's investments (non-retirement): \$ \_\_\_\_\_

Second parent's or Stepparent's cash, checking and savings accounts: \$ \_\_\_\_\_

Second parent's or Stepparent's investments (non-retirement): \$ \_\_\_\_\_

	Purchase Year	Purchase Price	Current Value	Current Debt	Monthly Mortgage Payment
Business or farm owned by you, your spouse or your parent(s):	_____	\$ _____	\$ _____	\$ _____	\$ _____
Home owned by you, your spouse or your parent(s):	_____	\$ _____	\$ _____	\$ _____	\$ _____
Other real estate owned by you, your spouse or your parent(s):	_____	\$ _____	\$ _____	\$ _____	\$ _____

## Section 8. Other Information

Please indicate if you currently participate in any of following programs:

Educational Opportunity Center (EOC)
  GEAR-UP
  Talent Search
  Upward Bound  
 Early College, Middle College or Gateway to College
  STEP
  Liberty Partnership
  TRIO

Have you filed for FAFSA?  Yes  No

Have you applied for TAP?  Yes  No

## Section 9. Personal Essay

Some of the campuses to which you have applied may require a Personal Essay. You can view these requirements at [www.suny.edu/attend/apply-to-suny/eop-financial](http://www.suny.edu/attend/apply-to-suny/eop-financial). If you have applied to any of these campuses, please provide a response to the following questions (up to 500 words) to help us better understand your interest in EOP.

- 1.) What motivated your interest to pursue post-secondary education?
- 2.) Explain the circumstances that affected your academic performance in high school.
- 3.) Based on what you know about the Educational Opportunity Program, how do you think the program will benefit you?

## Required Financial Documentation

You will need to provide the following documents for the tax year 2020 to verify the information reported.

### If you reported:

### You must attach:

You are a Non-U.S. citizen and a permanent resident

- Form I-551 (Permanent Resident Card)

You are in foster care

- Letter or court document from the government, courts, private agency responsible for your support

You are a ward of the court or county

- Letter or court document from the government, courts, private agency responsible for your support

You are an emancipated minor or in legal guardianship

- Court order or legal document

You are married

- Certificate of Marriage

You are on active duty

- Military orders

You are a U.S. Veteran

- Form DD214

You have been determined to be homeless

- Homeless youth determination from your high school or school district homeless liaison; or
- Homeless youth determination from the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development; or
- Homeless youth determination from the director of a runaway or homeless youth basic center or transitional living program

Income from wages, tips, dividends, interest, rental, business profits

### If Tax Return Filed:

- IRS form 1040, including all schedules, or official transcript of tax returns (visit <https://www.irs.gov/individuals/get-transcript>)

### If No Tax Return Filed:

- Forms W-2 or 1099; and
- IRS Verification of Non-Filing Letter (visit <https://www.irs.gov/individuals/get-transcript>)

Income from disability benefits, a pension, annuity, or unemployment benefits

- Letter from the appropriate institution stating applicable year's total award (if not already reported on a tax return)
- Disabilities Statement

Child Support, Maintenance or Alimony

- Signed affidavit, court order or legal document indicating amount of child support and/or alimony

Public Assistance

- A signed letter from the agency stating applicable year's total award and names of recipients

Social Security, Supplemental Security Income or Veterans Noneducation Benefits

- SSA Form 1099 or letter from the agency stating applicable year's total award for each member of the household including names of individuals

No income

- IRS Verification of Non-Filing Letter (visit <https://www.irs.gov/individuals/get-transcript>)
- You may be contacted for additional information

Unusual Circumstances

- Notarized letters, statements, death certificates, etc., that corroborate claims