SECTION B - ESTIMATED RESOURCES

2. List the amounts you and your family expect to contribute toward your educational and living expenses for 2018-2019 from these sources: (Do not include anticipated financial aid)

   From parent(s) income/assets $ 
   5% of total students assets $ 
   Student earnings from 2018 summer employment $ 
   Child support/non-custodial parent contribution $ 
   Outside scholarships $ 
   Grants from parents(s) employer $ 
   Other $ 
   Specify $ 

   Total $ 

SECTION C - HOUSEHOLD INFORMATION

3. How many family members will your parents support in 2018-2019? 
   Include yourself and your parents. List their names and provide information about them in #6.

4. Of the number in #3, how many will be in college at least half-time for at least one term in 2018-2019? 
   (Include yourself)

5. How many parents will be in college at least half-time 2018-2019? 
   (Check only one box) 
   Neither parent 
   One parent 
   Both parents 

6. What is your parents’ province of legal residence?
6. List all those in your household who will be dependent upon (i.e. supported by) your parent(s) in 2018-2019. Include yourself, your parent(s), (or your custodial parent if divorced/separated), (step) brothers, and (step) sisters, and other relatives.

<table>
<thead>
<tr>
<th>Name</th>
<th>Age</th>
<th>Check if living with family</th>
<th>Name of Present School or College 2017-18</th>
<th>Year in School 2017-18</th>
<th>Tuition and Fees 2017-18</th>
<th>Room and Board 2017-18</th>
<th>Scholarships or Gift Aid 2017-18</th>
<th>Parental Support Toward Tuition 2017-18</th>
<th>Name of Institution to be Attended 2018-19</th>
<th>Type of Institution 2018-19</th>
<th>Check if Full-Time</th>
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2/8
8. Divorced, Separated, or Remarried Parents:
To be answered by the parent who completes this form if the student's natural or adoptive parents are divorced, separated, or remarried.

a. Year of separation Year of divorce

b. Has either natural parent remarried? Mother / Year Father / Year

c. Non-custodial parent's name:
Home address

Occupation Employer

Work Telephone Email

d. According to court order, when will support for the student end? Month Year

e. Who last claimed the student as a tax exemption? Year

f. How much does the non-custodial parent plan to contribute to the student's education for the 2018-2019 school year? $

g. Is there an agreement specifying this contribution for the student's education? Yes No
9. Taxable Income
(The line references below are for 2016. For 2016, use the corresponding lines from 2016 tax forms).
   a. Wages, salaries, tips-father/stepfather (T1 line 101) → $
   b. Wages, salaries, tips-mother/stepmother (T1 line 101) → $
   c. Dividends-combination of both parents (T1 line 120) → $
   d. Interest income-combination of both parents (T1 line 121) → $
   e. Taxable income other than that listed above-combination of both parents
      (lines 104 through 146, except 120 and 121) → $
      (Please provide an itemized breakdown in Section K)
   f. Total (combination of both parents) 9a through 9e → $

10. Nontaxable Income & Benefits: (Explain sources in Section K) → $

11. Total Taxable & Nontaxable Income & Benefits: (add amounts in 9f and 10) → $

12. Credits
   a. Pension Plan Contributions (T1 line 308 or 310) → $
   b. Employment Insurance Premiums (T1 line 312) → $
   c. Allowable Medical Expenses (T1 line 332) → $

13. Taxes
   a. Canadian Net Federal Tax (T1 line 420) → $
   b. Provincial Tax (T1 line 428) → $
   c. Total Taxes (13a + b should equal T1 line 435) → $

SECTION E - PARENTS' 2017 EXPECTED INCOME & BENEFITS IN CANADIAN DOLLARS

If expected total income and benefits will differ from the 2016 total income and benefits by $3,000 or more, explain in Section K.

14. 2017 income earned from work by father or stepfather → $

15. 2017 income earned from work by mother or stepmother → $

16. 2017 other taxable income (Source of income) → $

17. 2017 nontaxable income and benefits → $

SECTION F - PARENTS' EXPENSES IN CANADIAN DOLLARS

18. Annual child support paid by the parent(s) completing this form → $

19. Annual child support paid by the parent(s) completing this form
   a. For parents' education → $
   b. For siblings, not currently enrolled (do not include student loans) → $

20. Annual elementary, junior high school, and high school tuition paid for all dependent children
   a. Amount paid → $
   b. For how many dependent children? (do not include the Penn student) → $

21. Annual medical and dental expenses not covered by insurance → $
SECTION G - PARENTS’ ASSETS IN CANADIAN DOLLARS

22. Cash, savings, and checking accounts 
   
23. List present accumulated value of retirement funds 
   
24. Investments 
   What is it worth today? 
   What is owed on it? 
   
25. Primary Home (Renters write “0”) 
   a. Year purchased 
   b. Purchase price 
   c. Monthly home mortgage or rent 
   
26. Other real estate* 
   a. Year purchased 
   b. Purchase price 
   c. Is this a rental property 
      yes  no 
   
*If you own several properties, provide information in Section K.

27. Business/Farm:
   Does either parent hold an interest in a 
   
   a. Corporation  yes  no
   b. Partnership  yes  no
   c. Farm  yes  no
   d. Schedule C Business  yes  no
   
   If the answer is yes, submit your most recent business tax return, all pages, 
   schedules, and T4 slips.

For all business/partnerships (attach additional sheets if necessary)

<table>
<thead>
<tr>
<th>Name of Business</th>
<th>Year Entered Business</th>
<th>Total Amount Invested</th>
<th>Percent of Ownership</th>
<th>Business Value</th>
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</table>

SECTION H - STUDENT’S 2016 INCOME & BENEFITS IN CANADIAN DOLLARS

28. 2016 income earned from work by student 
   
29. 2016 dividend and interest income 
   
30. 2016 total untaxed income and benefits 
   
SECTION I - STUDENT’S ASSETS IN CANADIAN DOLLARS

31. Indicate the amount of student assets (e.g., bank accounts, stocks, bonds, CDs) from the following sources:

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Inheritance</td>
<td>$</td>
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<tr>
<td>Parents' savings</td>
<td>$</td>
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<td>Gifts from other</td>
<td>$</td>
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<tr>
<td>Student Earnings</td>
<td>$</td>
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<td>Other</td>
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<td>Please specify</td>
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<tr>
<td>Total</td>
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**SECTION J - MONTHLY BUDGET IN CANADIAN DOLLARS**

Where possible, unusual expenses that are non-discretionary will be considered in the evaluation. A monthly budget of your family’s income/expenses can be particularly useful to us.

### Income:

- Total family income (net after taxes) from all sources
- Plus income tax refund (use annual column)

1. Total Income

### Expenses:

- Mortgage/Rent
- Utilities

**Insurance Payments**

- Auto
- Life
- Home
- Other
- Food
- Transportation
- Medical

**Debt**

- Auto Loan
- Home Equity Loan(s)
- Educational (except currently enrolled siblings and sibling’s student loans)
- Other (specify the reason each debt was incurred)

**Children’s expenses**

**Savings**

- Retirement fund contributions
- Other

### 2. Total Expenses & Savings

1. Total Income (from #1)
2. Total Income & Savings (from #2)
3. Net Surplus or Deficit

* If total monthly expenses exceed total monthly income, we require you attach a detailed written explanation of how you meet the outstanding expenses.
### SECTION K - SPECIAL CIRCUMSTANCES

**Additional Comments:**

You are encouraged to outline any special circumstances to describe your current financial situation. In some cases, expenses of a *non-discretionary* nature (due to illness, unemployment or other unforeseen expenses), may be included in our analysis. If your family has such special circumstances, outline below in the space provided or attach a letter.

<table>
<thead>
<tr>
<th>Debt and Reason Incurred</th>
<th>Date Incurred</th>
<th>Original Amount</th>
<th>Current Balance</th>
<th>Monthly Payment</th>
<th>Remaining Term</th>
<th>Creditor</th>
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We understand that the information provided on this form will be used to determine an estimate of the applicant’s financial aid eligibility at Penn and that this will not result in an official financial aid award or guarantee admission to Penn. We further understand that in order to receive an official award, we must be admitted to Penn, and submit all required financial aid application documents as outlined in the Penn Admission website at: www.admissions.upenn.edu. In addition, we understand that any notification received from Penn based on this information is an estimate only and is subject to change if our subsequent financial information differs.

We hereby certify that the information presented on this application is correct at this time.

Signature of Parent 1 or guardian 1

Signature of Parent 2 or guardian 2

Signature of applicant

date

date

date