



This form is for use with The Scholarship Foundation only and will not be accepted in place of the FAFSA at colleges, universities, or other scholarship providers.

NEED ASSESSMENT FORM

Student Name: _____

You should use this form only if you are ineligible to file the FAFSA.

To complete this form, use your own + your parent(s) 2023 Federal Taxes. If you are married, use only your own + your spouse's 2023 Federal Taxes (forms 1040 or 1040-SR).

Dependency Status Questions

Answer the following questions to determine your dependency status.

1. Were you born before January 1, 2002? Yes No
2. Are you married? Yes No
3. Will you be enrolled in a master's or doctorate program at the beginning of the 2025-26 school year? Yes No
4. Are you a veteran of the U.S. Armed Forces or currently serving on active duty? Yes No
5. Do you have children who will receive more than half of their financial support from you? Yes No
6. 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
7. Are you or were you an emancipated minor as determined by a court in your state of legal residence? Yes No
8. Are you or were you in legal guardianship as determined by a court in your state of legal residence? Yes No
9. At any time on or after July 1, 2024, were you homeless? Yes No

If you answered NO to questions 1-9, you are a DEPENDENT student, and you are required to include the tax information requested of your Biological or Adoptive parent(s).

If you answered YES to any of questions 1-9, you are an INDEPENDENT student, and you are NOT required to include your parent(s)' or guardian(s)' tax information.

If you answered YES to question 2, you are INDEPENDENT, and you must include the tax information of your spouse with your own.

1. If you are married, is your spouse enrolled in college at least part-time? Yes No
2. How many people live in your household? Count yourself, your parent(s), and your siblings. _____

3. Do you or your parents financially support anyone else in your household who is not yourself, your parent(s), or your siblings? Yes No

a. If Yes, please list their age(s) and their relationship to you

_____/_____
 (Age) (Relationship)

_____/_____
 (Age) (Relationship)

_____/_____
 (Age) (Relationship)

_____/_____
 (Age) (Relationship)

_____/_____
 (Age) (Relationship)

4. How many people in your household (including yourself) will be in college in the 2025-26 school year? _____

Parent Information

Adjusted Gross Income (AGI) appears on IRS Form 1040 (line 11), or IRS Form 1040-SR (line 11).

\$ _____

Student Information

Adjusted Gross Income (AGI) appears on IRS Form 1040 (line 11), or IRS Form 1040-SR (line 11).

\$ _____

Spouse Information (if student and spouse filed separately)

Adjusted Gross Income (AGI) appears on IRS Form 1040 (line 11), or IRS Form 1040-SR (line 11).

\$ _____

 Signature

 Date

For further assistance, questions, or support in Spanish please contact Liliana:

Para ayuda, preguntas, o apollo en español por favor comuníquese con Liliana:

Liliana De La Garza
 Bilingual Student Advisor
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Opening doors to education



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Once complete please print, sign and date this form, then upload it to your application where it asks for your Student Aid Index (SAI) and FAFSA Submission Summary.

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