

California Registered Domestic Partner - Supplement to the 2009-10 FAFSA

2009-10

Return to: Office of Financial Aid & Scholarships
California State University, Bakersfield
48 SA
9001 Stockdale Highway - Bakersfield, CA 93311-1022
Telephone: (661)654-3016 FAX: (661)654-6800
Web: <http://www.csub.edu/finaid> E-Mail: finaid@csb.edu



Assembly Bill (AB) 205, known as the California Domestic Partner Rights and Responsibilities Act of 2003 (the Act), was enacted on September 22, 2003 and became effective on January 1, 2005. The Act extends new rights, benefits, and obligations to individuals in California Registered Domestic Partnerships. The provisions of the Act apply to state and institutional financial aid only, not to federal student financial aid programs.

Effective January 1, 2005, the Act extends the rights and responsibilities of spouses to couples registered as domestic partners with the California Secretary of State ("Registered Domestic Partners").

Instructions:

Complete this form only if you are, or your custodial parent is, registered with the California Secretary of State as a domestic partner and you are applying for or receiving state and institutional aid from the California State University, Bakersfield campus.

In addition to completing this form, you may be asked to provide a copy of the Declaration of Domestic Partnership Certificate or SEC/STATE LP/SF DP-1.

Student's Last Name First Name

Student's Permanent Mailing Address

City State Zip Code

Student's Social Security Number Student's Campus-Assigned ID Number

As of today, are you registered with the California Secretary of State as a domestic partner?
yes no If yes, list date of registration _____

As of today, is your parent registered with the California Secretary of State as a domestic partner?
yes no If yes, list date of registration _____

(If you are separated from your domestic partner, or your parent is separated from his or her partner, but have not filed a Notice of Termination of Domestic Partnership with the California's Secretary of State's Office, you do not need to complete this form.)

I (we) certify under penalty of perjury under the laws of the State of California that all information reported on this form and the referenced worksheets is true, complete, and accurate. I (we) agree, if asked, to provide information that will verify the accuracy of this completed form and the referenced worksheets.

Student's Signature Date

Student's Partner's/Parent's Partner's Signature Date

Student's Parent's Signature Date

For the following questions, report your partner's or your parent's partner's income and assets.

1. **What was your partner's or your parent's partner's adjusted gross income for 2008?**
Adjusted Gross Income is on IRS Form 1040-line 37; 1040A-line 21; 1040EZ-line 4. \$ _____

2. **Enter the total amount of your partner's or your parent's partner's income tax for 2008.**
Income Tax Amount is on IRS Form 1040-line 56; 1040A-line 35; 1040EZ-line 11. \$ _____

3. **Enter your partner's or your parent's partner's exemptions for 2008.**
Exemptions are on IRS Form 1040-line 6d or on 1040A-line 6d; for 1040EZ see EZ worksheet line E to determine number of exemptions (\$3,200 equals one exemption). If single, enter 1, if married, enter 2. \$ _____

4. **How much did your partner or your parent's partner earn from working; wages, salaries, tips, etc., in 2008?**
Answer this question whether or not your partner or parent's partner filed a tax return. This information may be on the W-2 forms, or on IRS Form 1040-lines 7+12+18+Box 14 of IRS Schedule K-1 (Form 1065); 1040A-line 7; or 1040EZ-line 1. \$ _____

5, 6, 7. **Go to page 3 & 4 and complete the appropriate columns on either the left or right side of the 2008 Additional Financial Information and Untaxed Income. Enter your partner's or your parent's partner's totals in questions 5 & 6 respectively.**

Additional Financial Information (#5)	\$ _____
Untaxed Income (#6)	\$ _____

8, 9. **Go to page 4 to determine the appropriate household size and number of household members in college.**

8. **Household size.** WORKSHEET D (Box 1) _____

9. **Members of household in college.** WORKSHEET D (Box 2) _____

10. **As of today, what is your partner's, or your parent's partner's, total current balance in cash, savings, and checking accounts?** \$ _____

11. **As of today, what is the net worth of your partner's, or your parent's partner's, investments, including real estate (not their home)?** Net Worth means current value minus debt. \$ _____

12. **As of today, what is the net worth of your partner's, or your parent's partner's, current business and/or investment farms?** Net Worth means current value minus debt. Do not include a farm that you and your partner or your parent and your parent's partner live on and operate. \$ _____

Student's Partner

2008 Additional Financial Information

(questions 46 a-e & 94 a-e on FAFSA)

Parent's Partner

\$ _____	Education credits (Hope and Lifetime Learning tax credits) from IRS Form 1040 – line 50 or 1040A – line 31.	\$ _____
\$ _____	Child support you paid because of divorce or separation or as the result of a legal requirement. Don't include support for children in your (or your parents') 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 (or your parents') adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant or scholarship portions of fellowships and assistantships.	\$ _____
\$ _____	Combat pay or special combat pay. Only enter the amount that was taxable and included as adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$ _____
\$ _____	- Enter in question 5	\$ _____

Enter in question 5 -

Student's Partner

2008 Untaxed Income

(questions 47 a-j & 95 a-i on FAFSA)

Parent's Partner

\$ _____	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 boxes 12a through 12d, codes D, E, F, G, H and S.	\$ _____
\$ _____	IRA deductions and payments to self-employment SEP, SIMPLE, and Keogh and other qualified plans from IRS Form 1040 – line 28 + line 32 or 1040A – line 17.	\$ _____
\$ _____	Child support you 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.	\$ _____
\$ _____	Untaxed portions of IRA distributions from IRS Form 1040 – lines (15a minus 15b) or 1040A – lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$ _____
\$ _____	Untaxed portions of pensions from IRS Form 1040 – lines (16a minus 16b) or 1040A – lines (12a minus 12b). Exclude rollovers. If negative, enter a zero here.	\$ _____
\$ _____	Housing, food, and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits)	\$ _____
\$ _____	Veterans' non-education benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC), and/or VA Educational Work-Study allowances.	\$ _____
\$ _____	Other untaxed income not reported, such as worker's compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits,	\$ _____

	Supplemental Security Income, Workforce Investment Act educational benefits, combat pay benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.	
\$ _____	Money received or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ _____
\$ _____	- Enter in question 6	Enter in question 6 -
\$ _____		\$ _____

WORKSHEET D
Report Annual Amounts

If you, the student, are a registered domestic partner, complete **Section A**.
If your parent is a registered domestic partner, complete **Section B**.

Section A – Student’s and Student’s Partner’s Household

Include in the household:

- yourself and your partner, and
- you and your partner’s children if, between you, you will provide more than half of their support from July 1, 2009 through June 30, 2010 and
- other people if they now live with you and your partner, and you provide more than half of their support, and you will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.

Box 1 - enter in question 8 -

Of the persons included in Box 1, how many will be college students attending at least half time between July 1, 2009 and June 30, 2010? Always count yourself as a college student. Include others only if they will attend at least half time in 2009-10, in a program that leads to a college degree or certificate.

Box 2 - enter in question 9 -

Section B – Parent and Parent’s Partner’s Household

Include in the household:

- your parent and your parent’s partner and yourself, even if you don’t live with your parent, and
- your parent’s and your parent’s partner’s other children if:
 - 1) your parent and your parent’s partner will provide more than half of their support from July 1, 2009 through June 30, 2010, or
 - 2) the children could answer “No” to ALL of the following statements:
 - Were you born before January 1, 1984?
 - At the beginning of the 2009–2010 school year, will you be working on a master’s or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?
 - As of today, are you married? (Answer “Yes” if you are separated but not divorced.)
 - Do you have children who receive more than half of their support from you?
 - Are both of your parents deceased, or are you or were you (until age 18) a ward/dependent of the court?
 - Are you a veteran of the U.S. Armed Forces?
- other people if they now live with your parent and your parent’s partner, and your parent and the partner provide more than half of their support, and will continue to provide more than half of their support from July 1, 2009 through June 30, 2010.

Box 1 - enter in question 8 -

Of the persons included in Box 1, how many will be college students, attending at least half time between July 1, 2009 and June 30, 2010? Always count yourself as a college student. Do not include your parent or your parent’s partner. Include others only if they will attend, at least half time in 2009-10, in a program that leads to a college degree or certificate.

Box 2 - enter in question 9 -