
THOMAS AQUINAS COLLEGE
NONCUSTODIAL PARENT STATEMENT INSTRUCTIONS
2023-2024
California and New England Campuses

U.S. Student

PLEASE READ THESE INSTRUCTIONS FIRST.

Thomas Aquinas College adheres to the principle that both parents, regardless of their current marital status, have the primary responsibility for providing for their child's education and should be expected to provide reasonable financial support before College resources are used. This form is used by the College to evaluate the financial strength of the student's noncustodial parent.

For the student to be considered for Thomas Aquinas College's institutionally-funded, need-based aid program, the noncustodial parent must follow these simple steps:

Step 1: Send a completed **Noncustodial Parent Statement** (NPS) to the Financial Aid Office by **March 2, 2023**.

Step 2: Send a signed copy of the noncustodial parent's (and current spouse's, if remarried) **2021 federal tax return** to the Financial Aid Office at Thomas Aquinas College by March 2, 2023.

Sign the copy of the tax return (or make a copy of the previously signed return).

Be sure to include:

- All W-2s, schedules and attachments sent to the IRS;
- All SSA-1099s (Social Security Benefit Statements) for parents and all dependents within the family (if applicable); and
- All Form K-1s (Partner's / Shareholder's / Beneficiary's Share of Income, Deductions, Credits) issued by any partnerships, corporations and trusts (if applicable).

Return the NPS and accompanying tax information to the Financial Aid Office through our secure file portal, or by mail.

Secure File Portal:

<https://www.thomasaquinas.edu/financialaid/fa-upload>

Mailing address:

**THOMAS AQUINAS COLLEGE
FINANCIAL AID OFFICE
10,000 OJAI ROAD
SANTA PAULA, CA 93060**

Financial Aid Deadlines for Incoming Freshmen:

Incoming freshmen must submit the NPS and tax information by March 2nd or 15 days after acceptance, whichever is later.

Questions? Contact the Financial Aid Office at (805) 421-5936 or by e-mail at finaid@thomasaquinas.edu.

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THOMAS AQUINAS COLLEGE
NONCUSTODIAL PARENT STATEMENT
2023-2024
 California and New England Campuses

U.S. Student

Student: _____
First M.I. Last

_____ Street Address

_____ City _____ State _____ Zip Code

Date of Birth: _____

Home Phone: _____

Student's Cell Ph: _____

Student's E-mail: _____

Section A – Purpose of this Form

Thomas Aquinas College recognizes that financial complications may arise in meeting educational costs when parents are divorced or separated. The College believes, however, that parental responsibility for educational costs does not cease upon divorce or separation.

The College expects that a student's parents, even when divorced or separated, will provide funds for education expenses based on their ability to contribute from their income and assets. Both of the student's parents will be expected to submit financial information and to provide assistance with college expenses

based on their *ability* to pay, rather than their willingness to pay.

To apply for *federal* assistance, the student and custodial parent (and stepparent if the custodial parent has remarried) must complete the *Free Application for Federal Student Aid* (FAFSA). The FAFSA contains instructions to help the applicant determine who is the custodial parent, if that status is not clear.

To apply for *institutional aid* from Thomas Aquinas College assistance, the student and custodial parent (and stepparent if the custodial parent has remarried) must complete

the FAFSA and the *Confidential Financial Aid Application*.

Students who report that their biological or adoptive parents are separated, divorced or were never married, are also required to submit this *Noncustodial Parent Statement* (NPS) to apply for institutional aid. The income and assets of both parents (custodial and noncustodial) are considered, as well as expenses that their circumstances may require. The NPS is completed by the noncustodial parent and his/her current spouse if the noncustodial parent has remarried.

Section B – Direct Costs for 2023-2024

| | |
|-----------------------|------------------------|
| Tuition | \$28,700 |
| <u>Room and Board</u> | <u>\$10,700</u> |
| Total Direct Costs | \$39,400 |

Information regarding indirect expenses, such as book expense, pocket money, etc. can be found on the College's website at <https://www.thomasaquinas.edu/financialaid/cost-attendance>.

Section C – Noncustodial Parent's (and Current Spouse's) Proposed Payment toward Tuition, Room and Board

Thomas Aquinas College receives no campus-based subsidy from Church or State. It relies rather on the good faith effort of its students and their parents to pay as much as they are able toward the cost of the student's education. Students and parents are expected to make a maximum effort to cover the costs of tuition and room & board from their own resources. Each year the College seeks charitable contributions from individuals and charitable foundations to make up the difference between what families are able to pay and the actual cost of education.

Section C asks you (and your current spouse if you have remarried) to gener-

ously and prayerfully consider how much you are able to pay toward your child's cost of tuition, room and board at Thomas Aquinas College. The Church urges the Christian faithful to be generous in their support of apostolic works, including Catholic education, and to provide for the sustenance of those who carry out these ministries (cf. Canon Law 222, 800.2). Many families include what they pay toward Catholic education as part of their overall charitable giving. (You cannot deduct tuition payments as a charitable contribution for tax purposes, but the parent who claims the student as a dependent on their

tax return may be eligible for an education tax credit.)

In order to maintain fairness and equity, the Financial Aid Office also uses a uniform need-analysis formula to make a more mathematical determination of each family's payment responsibility. If a family's proposal exceeds the figure determined by the need-analysis formula, the Financial Aid Office will gratefully assemble a financial aid package that fits with the family's payment proposal. If, on the other hand, the need-analysis formula indicates a payment that is larger than the family's proposal, the financial aid package will be determined by the need-analysis formula.

1. Noncustodial parent's proposed payment toward tuition and room & board in 2023-24 \$ _____

The proposal asked for here should not include amounts that the custodial parent plans to contribute, nor should it include amounts the student plans to contribute from his or her summer income or savings. Those amounts will be determined by financial aid forms completed by the custodial parent and the student.

Section D – Noncustodial Parent’s (and Current Spouse’s) Contact Information

2. Student’s noncustodial parent

- a. Name _____ b. Age _____
- c. Street address _____
City, state ZIP code _____
- d. Occupation _____
- e. Employer _____ No. years _____
- f. If unemployed, date unemployment began _____
- g. Home Phone _____
- h. Work Phone _____
- i. Cell Phone _____
- j. E-mail Address _____
- k. If you have remarried, date of remarriage _____

3. Noncustodial parent’s current spouse, if remarried

- a. Name _____ b. Age _____
- c. Occupation _____
- d. Employer _____ No. years _____
- e. If unemployed, date unemployment began _____
- f. Work Phone _____
- g. Cell Phone _____
- h. E-mail Address _____

Section E – Supplemental Information about Noncustodial Parent’s (and Current Spouse’s) 2021 Income

In addition to submitting a copy of your 2021 federal income tax return and W-2s, in this section of the NPS we ask you to provide other information about your (and your current spouse’s) 2021 income.

- | | 2021
(Jan. 1 – Dec. 31) |
|---|-----------------------------------|
| 4. Child support paid in 2021 because of divorce or separation (Don't include support for children living in your household.)..... | \$ _____ |
| 5. Alimony paid in 2021 because of divorce or separation | \$ _____ |
| 6. Child support received in 2021 because of divorce or separation (Don't include foster care or adoption payments.)..... | \$ _____ |
| 7. Alimony received in 2021 because of divorce or separation | \$ _____ |
| 8. Untaxed Social Security benefits received in 2021 by, or for the benefit of, <u>other household members</u> (not the parents). For example, benefits received for children or older relatives living with the parents. (The school will gather information about the <i>parents'</i> <u>parents'</u> <i>untaxed Social Security benefits from the tax return.</i>)..... | \$ _____ |

Explain: _____

9. Other untaxed income received in 2021:

- Foster care or adoption payments received.....\$ _____
- Supplemental Security Income (SSI) for parents or other household members.....\$ _____
- Workers' Compensation\$ _____
- Temporary Assistance for Needy Families (TANF)\$ _____
- Supplemental Nutrition Assistance Program (SNAP) (formerly called Food Stamps)\$ _____
- Housing, food and other living allowances (military, clergy and others) including cash value of benefits\$ _____
- SSDI disability insurance received for all household members\$ _____
- Private disability insurance received for all household members.....\$ _____
- Veterans' non-educational benefits, such as Disability, Death Pension, or Dependency and Indemnity Compensation (DIC)\$ _____
- Cash received or any money paid on parents' behalf (for example, bills paid on parents' behalf)\$ _____

Section F – Changes in Noncustodial Parent’s (and Current Spouse’s) Gross Income in 2022 and 2023 (projected)

For the next two questions, we are asking noncustodial parents to estimate how much their income changed in 2022 and is projected to change in 2023.

10. Our 2022 gross income (taxable + untaxed income) was approximately \$ _____ greater less than in 2021.
AMOUNT OF CHANGE

Explain reason for change: _____

11. We project that our 2023 gross income (taxable + untaxed income) will be approximately \$ _____ greater less than in 2022.
AMOUNT OF CHANGE

Explain reason for change: _____

Note: If you want the Financial Aid Office to take into account any decrease in income, you must provide documentation of your decreased income (e.g., an end-of-year paystub or a current paystub showing year-to-date income totals).

Section G – Noncustodial Parent’s (and Current Spouse’s) Assets

12. As of today, what is the noncustodial parent’s (and current spouse’s, if applicable) total current balance of cash, savings and checking accounts?\$ _____

13. As of today, what is the net worth of the noncustodial parent’s (and current spouse’s, if applicable) investments, including real estate?
Do not include the home you live in. Net worth means current value minus related debt.\$ _____

Investments include real estate (do not include the home in which you live), rental property (includes a unit within a family home that has its own entrance, kitchen, and bath rented to someone other than a family member), 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, precious metals, cryptocurrences, etc. Investments also include qualified

educational benefits or education savings accounts (e.g. Coverdell savings accounts, 529 college savings plans and the refund value of 529 prepaid tuition plans). The noncustodial parent (and current spouse) must report as a parent asset all qualified education savings accounts owned by the noncustodial parent (and current spouse) for any family members, not just for the student applying to Thomas Aquinas College. Investments do not include the home in which you live, the value of life insurance, ABLE accounts, retirement plans (401[k]

plans, pension funds, annuities, non-education IRAs, Keogh plans, etc.) or cash, savings and checking accounts reported above. Investments also do not include UGMA and UTMA accounts for which you are the custodian, but not the owner. Investment value means the current balance or market value of these investments as of today. Investment debt means only those debts that are related to the investments.

14. As of today, what is the net worth of the noncustodial parent’s (and current spouse’s, if applicable) business(es) and/or investment farm(s)?\$ _____

Business and/or investment farm value includes the market value of land, buildings, machinery, equipment, inventory, etc. Business and/or investment farm debt means only those debts for which the business or investment farm was used as collateral.

Business value does not include the value of a small business if your family owns and controls more than 50 percent of the business, and the business has 100 or fewer full-time or full-time equivalent employees. For small business value, your family includes (1) persons directly related to you,

such as a parent sister or cousin, or (2) persons who are or were related to you by marriage, such as a spouse, stepparent or sister-in-law. Investment farm value does not include the value of a family farm that you live on and operate.

| | What is it worth today? | What is owed on it? | What is your monthly mortgage payment*? |
|--|-------------------------|---------------------|---|
| 15. a. If you own your home: | \$ _____ | \$ _____ | \$ _____ *PITI (Principal + Interest + Property Taxes + Homeowner’s Insurance) |
| b. If you rent your home, what is your monthly rent?: | \$ _____ | | |
| c. If someone else is providing you with housing, please explain in Section J. | | | |

Section G – Noncustodial Parent’s (and Current Spouse’s) Assets (continued from previous page)

16. **Current value of parents’ qualified retirement accounts and the cash value of life insurance** \$ _____
 Qualified retirement plan accounts include accounts such as 401(k), 403(b), 457, pensions, annuities, traditional IRAs, Roth IRAs, Roth 401(k), SEP SIMPLE and Keogh plans.

Section H – 2023-24 Family Member List, School List, and College Costs

Please read these instructions in their entirety before completing the table below.

17. **List below the people in your (the noncustodial parent’s) household. Include:**

- The student applicant, even if he or she does not live with you.
- You (the noncustodial parent) and your current spouse if you have remarried.
- Children for whom you will provide more than half their support from July 1, 2023, through June 30, 2024. (Foster children do not count in household size.)
- Your unborn child if that child will be born by June 30, 2024 and you will provide more than half of the child’s support from the projected date of birth through June 30, 2024. (If there is a medical determination of a multiple birth, then all expected children can be included.)
- Other people if they now live with you and receive more than half of their support from you and will continue to receive that support through June 30, 2024.

To determine whether to include children in the household size, the “support” test is used (rather than a residency requirement) because there may be situations in which a parent supports a child who does not live with the parent. In such cases, the parent who provides more than half of the child’s support may claim the child in his or her household size. It does not matter which parent claims the child as a dependent for tax purposes.

Support includes money, gifts, loans, housing, food, clothes, car payments or expenses, medical and dental care, and payment of school costs. If you receive benefits such as Social Security or Temporary Assistance for Needy Families (TANF) payments, in the child’s name, these benefits ought to be counted as parental support of the child.

If there are more family members than rows available, list the others in Section J.

If any of these family members will attend elementary or secondary school (including homeschool) in 2023-24, please provide the name of the school in the appropriate column. Report their expenses in Section I.

If any of these family members will attend college in 2023-24, please provide the full name of the college (not an abbreviation) in the appropriate column. Indicate whether the student will be attending college full-time or half-time in 2023-24.

| Family List in 2023-24 | | | Anticipated 2023-24 School / College | | |
|---|--|---|--------------------------------------|--|---|
| Full Name (See directions above for who should be included.) | Relationship to student (e.g., mother, father, sister, brother, etc.) | Date of Birth: Month and Year (mm/yyyy) | Grade Level in 2023-24 | Name of Elementary School, Secondary School or College that the family member will attend in 2023-24 | If the family member will be attending college in 2023-24, will he/she attend full-time or half-time? |
| 1. The student applicant | Self | | | Thomas Aquinas College | <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 2. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 3. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 4. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 5. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 6. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 7. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 8. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 9. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 10. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 11. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |
| 12. | | | | | <input type="checkbox"/> Full-time <input type="checkbox"/> Half-time |

Section I – Noncustodial Parent’s (and Current Spouse’s) Special Circumstances (OPTIONAL)

This section is **OPTIONAL**.

This section asks about special circumstances which may impact a family's ability to pay for college. If you wish to have these circumstances taken into consideration when determining your son's or daughter's eligibility for need-based financial aid, please answer the questions listed in this section. All information reported to the Financial Aid Office is kept in the strictest confidence. If you prefer not to complete this section, skip to Section J.

| 18. Expenses paid by noncustodial parent (and current spouse, if applicable) for Elementary and Secondary School (including Homeschool) | 2022-23 School Year (07/01/22 – 06/30/23) | Expected in 2023-24 School Year (07/01/23 – 06/30/24) |
|--|---|---|
| a. Tuition/fees (net of any financial aid) | \$ _____ | \$ _____ |
| Include tuition/fees paid to homeschool oversight schools. | | |
| b. Books and supplies | \$ _____ | \$ _____ |
| c. Other school-related expenses (e.g. tutors, music lessons, athletics, etc.) Use Section J if additional space is needed. | | |
| Item: _____ | \$ _____ | \$ _____ |
| Item: _____ | \$ _____ | \$ _____ |
| Item: _____ | \$ _____ | \$ _____ |
| Item: _____ | \$ _____ | \$ _____ |

| | 2022 (Jan. 1 – Dec. 31) | Expected in 2023 (Jan. 1 – Dec. 31) |
|---|-----------------------------------|---|
| 19. Noncustodial parent’s (and current spouse’s, if applicable) annual medical, dental and vision expenses NOT covered by insurance | \$ _____ | \$ _____ |
| <ul style="list-style-type: none"> • <u>Medical and dental expenses are taken into account only if they exceed 5% of gross income.</u> • You may include orthodontia payments that are not covered by insurance. • You may include the cost of your health insurance if you pay for your health insurance with <u>after-tax</u> dollars. • Do <u>not</u> include amounts paid with employer-paid contributions to a Health Savings Account (HSA) or paid through pre-tax cafeteria plans (e.g. Section 125 plans) since these amounts are not included in your income reported on your tax return or on the FAFSA • You <u>must attach substantiating documentation</u> for all medical expenses that you want taken into account. | | |

| | | |
|---|----------|----------|
| 20. Repayment of education loans for noncustodial parent or current spouse to attend college | \$ _____ | \$ _____ |
| <u>Attach substantiating documentation of min req'd monthly payments and loan balance.</u> | | |

| | | |
|---|----------|----------|
| 21. Support of extended family members not included in Section H | \$ _____ | \$ _____ |
| Explain: _____ | | |
| _____ | | |

22. Nondiscretionary debt
Examples of a "nondiscretionary debt" would be a debt incurred for a medical procedure in a prior year or a debt to cover basic living expenses while unemployed. Do not include home mortgage loans, vehicle loans or parents' education loans. Use Section J if additional space is needed.

| | | |
|---|-------------------------|-------------------------|
| Reason for incurring debt: _____ | \$ _____ | \$ _____ |
| Balance as of today: \$ _____ | (min req'd annual pmts) | (min req'd annual pmts) |
| Reason for incurring debt: _____ | \$ _____ | \$ _____ |
| Balance as of today: \$ _____ | (min req'd annual pmts) | (min req'd annual pmts) |

Section J— Explanations / Special Circumstances (Use an extra sheet of paper if more space is needed.)

Section K – Certification

Parent's Certification: By typing my name below, I certify that all the information on this form is true and complete to the best of my knowledge. I understand that the deliberate inclusion of false or misleading information will result in the loss of eligibility for institutional aid. If asked, I agree to give proof of the information that I have given on this form. If asked, I agree to provide a signed copy of my 2021 and/or 2022 federal tax return with all schedules and W-2s. I certify that all information is correct at this time, and that I will send timely notice of any significant changes in family income or assets, financial situation, or the college plans of other children.

By typing your name below, you agree to the above certification.

Noncustodial parent's certification (Type first and last name.)

Date

Do you authorize the College to discuss the information collected on this form with the student applicant? Yes No

Return this PDF and any attachments to the Financial Aid Office through our secure file portal, or return the form by mail.

Secure File Portal:
<https://www.thomasaquinas.edu/financialaid/fa-upload>

Mailing address:
THOMAS AQUINAS COLLEGE
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