

NEW YORK STATE HIGHER EDUCATION SERVICES CORPORATION
Income Questionnaire
Excelsior Scholarship

Records from the NYS Department of Taxation and Finance identify that you, your parent(s) or your spouse did not file a New York State income tax return for the 2016 tax year.

To complete the processing of your application, please complete and sign this form, and email an image or scanned copy of the form together with all required documentation as instructed below to: excelsior.231@hesc.ny.gov using the subject "Income Questionnaire."

I. STUDENT INFORMATION

1. Student Name (Last, First, MI): _____
2. Student SSN: _____ - _____ - _____
3. Student Date of birth: ____/____/____
4. Student current address: _____

II. RESIDENCY

During calendar year 2016, which of these describes you, your parent(s) or your spouse, if applicable.

APPLICANT INSTRUCTIONS:

- If your parents are divorced: for Parent 1, check the answer for the parent who claims you as a dependent, and for Parent 2 check "not applicable."
- If you have established your own permanent household and are an independent student: For both Parent 1 and 2, check N/A.
- If you are not married, for Spouse check N/A.

	Resided in NYS all Year	Moved to NYS in 2016 (Provide date)	Resided outside of NYS (Provide state)	Not Applicable
Applicant	<input type="checkbox"/>	<input type="checkbox"/> __/__/__	<input type="checkbox"/> _____	
Parent 1	<input type="checkbox"/>	<input type="checkbox"/> __/__/__	<input type="checkbox"/> _____	<input type="checkbox"/>
Parent 2	<input type="checkbox"/>	<input type="checkbox"/> __/__/__	<input type="checkbox"/> _____	<input type="checkbox"/>
Spouse	<input type="checkbox"/>	<input type="checkbox"/> __/__/__	<input type="checkbox"/> _____	<input type="checkbox"/>

III. STUDENT 2016 INCOME

1. For calendar year 2016, which of these described you?
 - Full-time student/not employed for pay
 - Part-time student/not employed for pay
 - Full-time employed / Amount earned: \$ _____
 - Part-time employed / Amount earned: \$ _____

2. If you were employed and earned income, which describes how you reported your income for tax filing purposes?

- I filed my own NYS income tax return (please submit your 2016 NYS return)
- I filed my own income tax return in another state / Name of State: _____ (please submit your 2016 federal income tax return)
- My income was included in my parent(s)' 2016 **NYS** tax return filings
- My income was included in my parent(s)' 2016 tax return filings in another state / Name of State: _____
- My income was included in my spouse's 2016 **NYS** tax return filings
- My income was included in my spouse's 2016 tax return filings in another state / Name of State: _____
- I was not required to file a tax return in 2016

IV. PARENT OR SPOUSE 2016 INCOME

1. For calendar year 2016, which of these described Parent 1?

- Full-time employed / Amount earned: \$ _____
- Part-time employed / Amount earned: \$ _____
- Not employed for pay

If Parent 1 was employed and earned income, which describes how he/she reported their income for tax filing purposes?

- Parent 1 filed a separate 2016 NYS income tax return (please submit the 2016 NYS return)
- Parent 1 filed a joint 2016 NYS income tax return with his/her spouse (please submit the 2016 NYS return)
- Parent 1 filed his/her income tax return in another state / Name of State: _____ (please submit the 2016 federal income tax return)
- Parent 1 was not required to file a tax return in 2016

2. For calendar year 2016, which of these described Parent 2?

- Full-time employed / Amount earned: \$ _____
- Part-time employed / Amount earned: \$ _____
- Not employed for pay

If Parent 2 was employed and earned income, which describes how he/she reported their income for tax filing purposes?

- Parent 2 filed a separate 2016 NYS income tax return (please submit the 2016 NYS return)
- Parent 2 filed a joint 2016 NYS income tax return with his/her spouse (please submit the 2016 NYS return)
- Parent 2 filed his/her income tax return in another state / Name of State: _____ (please submit the 2016 federal income tax return)
- Parent 2 was not required to file a tax return in 2016

3. For calendar year 2016, which of these described your spouse?

- Full-time employed / Amount earned: \$ _____
- Part-time employed / Amount earned: \$ _____
- Not employed for pay

If your spouse was employed and earned income, which describes how he/she reported their income for tax filing purposes?

- My spouse filed a separate NYS income tax return (please submit the 2016 NYS return)
- My spouse and I filed a joint NYS income tax return (please submit the 2016 NYS return)
- My spouse filed his/her income tax return in another state / Name of State: _____ (please submit the 2016 federal income tax return)
- My spouse was not required to file a tax return in 2016

APPLICANT AFFIRMATION

By my signature below, I am affirming under the penalty of perjury that all the information I provided in this Income Questionnaire is true and complete.

Signature of Scholarship Applicant

Date