TASFA 2027-2028

TEXAS APPLICATION FOR STATE FINANCIAL AID

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Each Texas high school student is required as a condition of graduation to complete either the Free Application for Federal Student Aid (FAFSA) or Texas Application for State Financial Aid (TASFA) or opt out, as required by Texas Education Code (TEC), Title 2, Section 28.0256. All students interested in applying for financial aid are encouraged to first review the FAFSA. Filling out the FAFSA allows a student to be considered for a broader range of financial aid options than filling out the TASFA. The FAFSA allows a student to be considered for federal, state, and institutional financial aid opportunities. If a student completes the FAFSA, the student **should not** complete a TASFA.

Students who do not complete a FAFSA may complete a TASFA to be considered for state financial aid programs. Remember that failing to fill out a FAFSA means that the student will not be considered for any federal financial aid programs.

State financial aid programs require that a student is a Texas resident.

The 2027-28 state financial aid priority application deadline for many institutions of higher education is **January 15, 2027**. It is important to complete and submit this application with all required documentation to the financial aid office **on or before January 15** to be considered for the most financial aid possible.

To complete this application, answer the items within each applicable section. If a question does not apply to you, answer N/A for *not applicable*. For clarification on certain items, refer to the **TASFA Notes on pages 7-13**. If you have further questions about this form, contact the financial aid office at your institution. More information on the TASFA can be found at https://www.highered.texas.gov/students-families/tasfa/.

Note: Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION 1: STUDENT INFORMATION

DEMOGRAPHICS

1. Last Name	2. First Name	3. Middle Initial
4. Date of Birth	5. What is your Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Deferred Action for Childhood Arrivals (DACA) number? _____ ☐ N/A	
6. Your permanent mailing address number and street (include apt. number)		
7. City	8. State	9. ZIP Code	10. Phone Number
11. Your Email Address		

EDUCATION DETAILS

12. What will your high school (HS) completion status be when you begin college in the 2027-28 school year?	☐ High School Diploma ☐ High School Equivalency Certificate (e.g., GED, HiSET) (Skip to questions 13c & 13d)	☐ Homeschooled (Skip to question 14) ☐ None of these (Skip to question 14)
13a. High School Name (If applicable)		
13b. High School City (If applicable)	13c. HS State (If applicable)	13d. HS ZIP code (If applicable)
14. Will you have your first bachelor's degree before you begin the 2027-28 school year?	☐ Yes ☐ No	

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

An individual born male must complete the Selective Service Statement of Registration Status below, in accordance with TEC Section 51.9095. For more information on Selective Service registration, visit sss.gov.

15. Were you born male or female? ☐ Male ☐ Female

16. Please mark one option below:

☐ I was born female and not required to register.

☐ I was born male and am under the age of 18, and not currently required to register.

☐ I was born male and am **REGISTERED** with the Selective Service.

☐ I was born male and am over age 18. I am not registered with the Selective Service, and I am not exempt.

☐ I was born male and am **EXEMPT** from registration because: (please briefly explain why you are exempt in the box below.)

STUDENT MARITAL STATUS

17. What is your marital status as of today?
- ☐ Single (never married)
- ☐ Married (not separated)
- ☐ Remarried
- ☐ Separated
- ☐ Divorced
- ☐ Widowed

18. Month and year you were married, remarried, separated, divorced, or widowed.
Month: _____ Year: _____ ☐ N/A

19. Spouse's Last Name _____ ☐ N/A

20. Spouse's First Name _____ ☐ N/A

21. What is your spouse's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Deferred Action for Childhood Arrivals (DACA) number? _____ ☐ N/A

STUDENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. *See Notes for questions 22-29.*

22. How much did you earn from working in 2025?
_____ ☐ N/A

23. How much did your spouse earn from working in 2025?
_____ ☐ N/A

24. For 2025, have you completed your IRS income tax return or another tax return?
- ☐ Already completed
- ☐ Will file
- ☐ Not going to file (Skip to question 30)

25. What income tax return did you file or will you file for 2025?
- ☐ IRS 1040
- ☐ Foreign tax return, IRS 1040NR or IRS 1040NR-EZ
- ☐ Tax return from Puerto Rico, a U.S. territory, or Freely Associated State

26. What is or will be your tax filing status for 2025?
- ☐ Single
- ☐ Married filing jointly
- ☐ Qualifying surviving spouse
- ☐ Head of household
- ☐ Married filing separately

27. Did (or will) you file a Schedule A, B, D, E, F, or H with your 2025 tax return?
- ☐ Yes
- ☐ No
- ☐ Don't Know

28. What was your (and spouse's) adjusted gross income for 2025?
Adjusted gross income is on IRS Form 1040—line 11. _____

29. Enter your (and spouse's) income tax paid for 2025 from 1040—line 24.
If negative, enter zero. _____

DO NOT LEAVE ANY BLANKS. If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for you (and your spouse if applicable). *See Notes for questions 30-43.*

STUDENT ASSETS

30. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? *Don't include student financial aid, retirement accounts, or investments.*	
31. As of today, what is the net worth of your (and spouse's) investments, including real estate? *Don't include the home you live in. Net worth is the value of the investments minus any debts owed against them.*	
32. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? *Net worth is the value of the businesses or farms minus any debts owed against them. Don't include a family business with 100 or fewer full-time employees, farms where the family resides, or a commercial fishing business and related expenses.*	
33. Child support **received** for any of your children. **Don't include** foster care or adoption payments.	

STUDENT 2025 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME	
34. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3 + Form 1040—line 29.	
35. Taxable college grant and scholarship aid **reported to the IRS as income**. *Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.*	
36. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—Total of lines 16 + 20.	
37. Tax exempt interest income from IRS Form 1040—line 2a.	
38. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b.	
39. IRA rollover into another IRA or qualified plan.	
40. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
41. Pension rollover into an IRA or other qualified plan.	
42. Net profit or loss from IRS Form 1040—line 31 of Schedule C.	
43. Foreign earned income exclusion from IRS Form 1040—line 8d of Schedule 1.	

SECTION 2: STUDENT STATUS DETERMINATION

Answer all questions 44-54. *See Notes for questions 44-54.*

44. Were you born before January 1, 2004?	☐ Yes ☐ No
45. As of today, are you married?	☐ Yes ☐ No
46. Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?	☐ Yes ☐ No
47. Are you a veteran of the U.S. Armed Forces?	☐ Yes ☐ No
48. Do you have children who will receive more than half of their support from you between July 1, 2027, and June 30, 2028?	☐ Yes ☐ No
49. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2028?	☐ Yes ☐ No
50. **At any time since you turned age 13,** were you an orphan (no living biological or adoptive parent), were you in foster care, or were you a ward of the court?	☐ Yes ☐ No
51. As determined by a court in your state of residence, are you or were you an emancipated minor?	☐ Yes ☐ No
52. Does someone other than your parent or stepparent have legal guardianship of you, as determined by a court in your state of legal residence?	☐ Yes ☐ No
53. **At any time on or after July 1, 2026, were you an unaccompanied student and either (1) homeless or (2) self-supporting and at risk of being homeless?**	☐ Yes ☐ No

54. **If your answer to question 53 is "Yes," did any of the following determine that you were homeless or at risk of becoming homeless? Select all that apply.**	Director or designee of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving those experiencing homelessness. Your high school or school district homeless liaison or designee. Director or designee of a project supported by a federal TRIO or GEAR UP program grant. Financial aid administrator (FAA). None of these apply.

SECTION 3: PARENT INFORMATION

STOP: If you answered "**YES**" to any of the questions in **SECTION 2**, parental information is **NOT** required. Proceed to **SECTION 4**.

If you answered "**NO**" to **all the questions in SECTION 2**, you **must include** parental information, even if you do not live with your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]).

Grandparents, foster parents, legal guardians, widowed stepparents, aunts, uncles, and siblings are **not** considered parents on this form, unless they have legally adopted you. If your legal parents are married to each other, or are not married to each other and **live together**, answer the questions about both of them.

If you are in a single-parent home (e.g., parent(s) never married, divorced, separated, etc.), review the *TASFA Notes* for clarification.

55. As of today, what is the marital status of your legal parents?

- ☐ Single (never married)
- ☐ Married (not separated)
- ☐ Remarried
- ☐ Separated
- ☐ Divorced
- ☐ Widowed
- ☐ Unmarried and both legal parents living together

56. Month and year your parents were married, remarried, separated, divorced, or widowed:

Month: _____ Year:_____ ☐ N/A (Never Married)

57. Did either of your parents attend or complete college?

- ☐ Neither parent attended college
- ☐ One or both parents attended college, but neither parent completed college
- ☐ One or both parents completed college
- ☐ Don't know

PARENT 1

58. Last Name		59. First Name	
60. Date of Birth		61. What is your Parent 1's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Deferred Action for Childhood Arrivals (DACA) number? _____ ☐ N/A	
62. Phone Number		63. Email Address	

PARENT 2 (IF APPLICABLE)

64. Last Name		65. First Name	
66. Date of Birth		67. What is your Parent 2's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), or Deferred Action for Childhood Arrivals (DACA) number? _____ ☐ N/A	
68. Phone Number		69. Email Address	

PARENT EARNINGS AND TAX INFORMATION

The financial aid office may require documentation, such as W-2s, tax returns, or tax transcripts. *See Notes for questions 70-77.*

70. How much did Parent 1 earn from working in 2025? _____

71. How much did Parent 2 earn from working in 2025? _____ (If applicable)

72. For 2025, have your parents completed an IRS income tax return or another tax return?

- ☐ Already completed
- ☐ Will file
- ☐ Not going to file (skip to question 78)

73. What income tax return did your parents file or will they file for 2025?

- ☐ IRS 1040
- ☐ Foreign tax return, IRS 1040NR or IRS 1040NR-EZ
- ☐ Tax return from Puerto Rico, a U.S. territory, or Freely Associated State

74. What is or will be your parents' tax filing status for 2025?

- ☐ Single
- ☐ Head of household
- ☐ Married filing jointly
- ☐ Married filing separately
- ☐ Qualifying surviving spouse

75. Did (or will) your parents file a Schedule A, B, D, E, F, or H with their 2025 tax return?

- ☐ Yes
- ☐ No
- ☐ Don't Know

76. Enter your parents' 2025 adjusted gross income from IRS Form 1040—line 11. _____

77. Enter your parents' 2025 income tax paid from 1040—line 24. If negative, enter a zero. _____

DO NOT LEAVE ANY BLANKS.
If the answer is zero or the question does not apply to you, enter "0." Report whole dollar yearly amounts with no cents. Enter the combined amounts for your parents (if applicable). *See Notes for questions 78-91.*

PARENT ASSETS

78. As of today, what is your parents' total current balance of cash, savings, and checking accounts? *Don't include student financial aid, retirement accounts, or investments.*	
79. As of today, what is the net worth of your parents' investments, including real estate? *Don't include the home in which your parents live. Net worth is the value of the investments minus any debts owed against them.*	
80. As of today, what is the net worth of your parents' current businesses and/or investment farms? *Net worth is the value of the businesses or farms minus any debts owed against them. Don't include a family business with 100 or fewer full-time employees, farms where your family resides, or a commercial fishing business and related expenses.*	
81. Child support your parents **received** for any of their children. **Don't include** foster care or adoption payments.	

PARENT 2025 ADDITIONAL FINANCIAL INFORMATION AND UNTAXED INCOME (ENTER THE COMBINED AMOUNTS FOR YOUR PARENTS)

82. Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3 + Form 1040—line 29.	
83. Your parents' taxable college grant and scholarship aid **reported to the IRS as income**. *Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.*	
84. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.	
85. Tax exempt interest income from IRS Form 1040—line 2a.	
86. Untaxed portions of IRA distributions from IRS Form 1040—line 4a minus 4b.	
87. IRA rollover into another IRA or qualified plan.	
88. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
89. Pension rollover into an IRA or other qualified plan.	
90. Net profit or loss from IRS Form 1040—line 31 of Schedule C.	
91. Foreign earned income exclusion from IRS Form 1040—line 8d of Schedule 1.	

SECTION 4: FAMILY INFORMATION

FEDERAL BENEFITS RECEIVED

This information being collected below will be used to help determine eligibility for certain state financial aid options. Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974.

At any time during 2025 or 2026, did you or anyone **in your family** (including your spouse or parents, if applicable) receive benefits from any of the federal programs listed? Mark all that apply with Yes, No or Prefer not to answer.

92. Medicaid, Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), refundable credits for coverage under a qualified health plan (QHP), or lower premiums for plans purchased through the Health Insurance Marketplace.	☐ Yes ☐ No ☐ Prefer not to answer
93. Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps	☐ Yes ☐ No ☐ Prefer not to answer
94. Free and Reduced-Price School Lunch Program	☐ Yes ☐ No ☐ Prefer not to answer
95. Temporary Assistance for Needy Families (TANF) – may use a different name in different states	☐ Yes ☐ No ☐ Prefer not to answer
96. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	☐ Yes ☐ No ☐ Prefer not to answer
97. Earned Income Credit (EIC)	☐ Yes ☐ No ☐ Prefer not to answer
98. Federal Housing Assistance	☐ Yes ☐ No ☐ Prefer not to answer

FAMILY SIZE

If you answer "NO" to all questions in SECTION 2 (44-54), use these instructions to calculate your totals for questions 99 and 100.

- **Total number in family:** Include your parent (and spouse), yourself, your parent's dependent children (even if they live apart because of college enrollment), and other people living with your parent now. Include these dependent children and other people only if your parent will provide more than half of their support between July 1, 2027, and June 30, 2028.
- Total number in college for 2027-28: Always count yourself as a college student. Do not include your parents.

If you answer "YES" to any question in SECTION 2 (44-54), use these instructions to calculate your totals for questions 99 and 100.

- **Total number in family:** Include yourself (and spouse), your dependent children (even if they live apart due to college enrollment), and other people living with you now. Include these dependent children and other people only if you will provide more than half of their support between July 1, 2027, and June 30, 2028.
- **Total number in college for 2027-28:** Always count yourself as a college student.

99. How many people are in your family? (see instructions above) _____

100. How many people in your family will be college students between July 1, 2027, and June 30, 2028? (see instructions above) _____

SECTION 5: COLLEGE INFORMATION

COLLEGE INFORMATION

If you plan to submit your TASFA to multiple institutions, answer the questions below for each copy you submit. Your housing status is based on your living situation at the college you plan to attend and may vary. Your college student ID, if you were provided one, is an optional item that will be used to match your application with your official student record if you enroll at a college.

101. What college do you plan to attend for 2027-28? (response optional) _____

102. Where do you plan to live when you attend college? (response required) ☐ On-campus ☐ Off-campus ☐ With parents or relative

103. What is your college student ID#, if you were provided one? (response optional) _____

SECTION 6: SIGNATURE

I confirm that the information provided on this TASFA is true and correct to the best of my knowledge. If eligible, I will use any student financial aid provided as a result of my submission to pay only the cost of attending a Texas institution of higher education. I understand that any false statements may void my eligibility for state (or institutional) financial aid. By signing this application, I also acknowledge and consent to the following:

- I understand that the information provided on this application will be used only for evaluation of eligibility for state (or institutional) financial aid and that I may need to provide additional information or documentation to the college or university to determine eligibility.
- Once my application has been submitted, I must contact the college or university directly to discuss next steps to update or correct information on my submitted TASFA.

Student Signature _____ Date _____

Parent Signature _____ Date _____

*One parent signature is required if all questions in **SECTION 2** (questions 44-54) were answered "**NO**."*

Mark which parent signed above. ☐ Parent 1 ☐ Parent 2

Submitting the TASFA: Your completed application should be sent directly to the institution that you plan to attend for the 2027-28 school year. Contact the institution's financial aid office for additional instructions (see notes page 13).

TASFA NOTES 2027-2028
TEXAS APPLICATION FOR STATE FINANCIAL AID

THECB
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COORDINATING BOARD

These notes help explain certain questions on the Texas Application for State Financial Aid (TASFA), but you can also contact the financial aid office at the institution you currently attend or plan to attend for the 2027-28 award year if you need additional assistance completing this application.

All students interested in applying for financial aid are encouraged to first review the Free Application for Federal Student Aid (FAFSA). Filling out the FAFSA allows a student to be considered for a broader range of financial aid options than filling out the Texas Application for State Financial Aid. The FAFSA allows a student to be considered for federal, state, and institutional financial aid opportunities. If a student completes the FAFSA, the student should not complete a TASFA.

Students who do not complete a FAFSA may complete a TASFA to be considered for state financial aid programs. Remember that failing to fill out a FAFSA means that the student will not be considered for any federal financial aid programs. State financial aid programs require that a student is a Texas resident. To learn more about the requirements for Texas residency, click here.

SECTION ONE: STUDENT INFORMATION

Notes for questions 1 and 2 (page 1)

Enter your full, legal first and last name. Do not use nicknames or abbreviations since this information will be used to match your application with your official student record if you enroll at a college.

Notes for question 5 (page 1)

If you have been issued a Social Security card, enter your assigned number. If you have been approved for Deferred Action for Childhood Arrivals (DACA), enter your assigned Social Security Number (SSN) through this program. If you have an Individual Taxpayer Identification Number (ITIN), enter it.

Note: An SSN is not necessary to be eligible for state financial aid and will be used to match your application with your official student record if you enroll at a college. Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

Notes for question 6 (page 1)

Enter your permanent mailing address street number and street name, or PO Box (be sure to include your apartment number, if applicable).

Notes for question 11 (page 1)

Enter your email address. Ensure the email address entered is one you review often and has sufficient storage to receive application updates. Do not use an email issued by your high school, college, work or other temporary organization.

Notes for question 12 (page 1)

Select the answer that describes your high school completion status before the first date of your enrollment in college:

- High school diploma means you have received or will receive a high school diploma before the first date of your enrollment in college.
- High School Equivalency Certificate (e.g., GED, HiSET) means you have received or will receive an equivalency certificate before the first date of your enrollment in college.
- Homeschooled means you have completed homeschooling at the secondary level regulated by your state.
- "None of these" means you do not or will not have a high school diploma, GED, or equivalent before the first date of your enrollment in college and did not complete secondary school in a homeschool setting.

Notes for questions 15-16 (page 1)

Enter your gender at birth. This will only be used for the purpose of determining items related to Selective Service.

Individuals who were born male are required to complete a **Selective Service Statement of Registration Status** (Texas Education Code (TEC), Title 3, Section 51.9095). If you are male and between the ages of 18 and 25, you can register or review registration requirements at www.sss.gov or by completing a registration form found at a U.S. Post Office. If you are over the age of 25, you can no longer register.

Notes for question 17 (page 2)

Report your marital status as of the date you sign your TASFA. If your marital status changes after you sign your TASFA, check with the financial aid office at your institution.

Notes for question 21 (page 2)

If your spouse has been issued a Social Security card, enter the assigned number. If they have been approved for Deferred Action for Childhood Arrivals (DACA), enter their assigned Social Security Number (SSN) through this program. If they have an Individual Taxpayer Identification Number (ITIN), enter it.

Notes for questions 22 and 23 (page 2)

Enter 2025 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on your tax return: Internal Revenue Service (IRS) Form 1040 (or 1040-NR): Line 1z + Schedule 1: lines 3 + 6. If you are married, spouse earnings must be included, whether taxes were filed together or separately.

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

To accurately assess your financial situation, your institution needs to account for all sources of income. In cases where your family's earnings from employment are at or above the IRS filing threshold requirements, the financial aid office will require that you file taxes before processing your TASFA. Tax filing requirements can be found

in the IRS Publication 17, Table 1-1: 2025 Filing Requirements for Most Taxpayers.

Nontax filers: If you (and your spouse) did not file taxes, contact the financial aid office to see if additional information is needed.

Notes for question 24 (page 2)

If you indicate you "Will file" a 2025 tax return and your 2025 income is similar to your 2024 income, use your 2024 income tax return to provide estimates for questions about your income. If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

To access your tax records and transcripts, go to https://www.irs.gov/individuals/get-transcript.

Notes for question 25 (page 2)

If you filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If you filed a foreign return, convert all monetary units to U.S. dollars using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to federalreserve.gov/releases/h10/current.

Notes for question 26 (page 2)

If you filed or will file an IRS Form 1040 tax return, select your tax return filing status for 2025 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

The "Filing Status" field is located at the top of page one on IRS Form 1040.

Notes for question 28 (page 2)

If you filed a 2025 tax return (or if married, you and your spouse filed a joint tax return), the AGI can be found on IRS Form 1040—Line 11.

If you and your spouse filed separate tax returns, calculate your total AGI by adding line 11 from both 2025 tax returns and entering the total amount.

If you or your spouse will file a federal tax return but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

If one of you filed a tax return and the other didn't and won't file, add line 11 from your 2025 IRS Form 1040 to your spouse's 2025 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 29 (page 2)

This question cannot be left blank if you (and your spouse) filed or will file a 2025 income tax return.

Income tax paid can be found on your 2025 IRS Form 1040—line 24. If negative, enter a zero.

Note: The line numbers above are from the IRS tax form, not from the W-2 form.

Notes for question 30 (page 2)

Add the account balances of your (and your spouse's) cash, savings, and checking accounts as of today. Enter the total of all accounts as the total current balance. If the total is negative, enter zero as the total current balance.

Do not add student financial aid, retirement accounts, or investments into your account balances. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 31 (page 2)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms, minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

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, etc.

Investments also include qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, 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.

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.

Notes for question 32 (page 2)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that you (and your spouse) own as of today.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Don't include a family business with 100 or fewer full-time employees, farms where your family resides, or a commercial fishing business and related expenses.

Notes for question 33 (page 2)

Enter the total amount of child support you (and your spouse) received in 2025 for all children in your household.

- If you received the same dollar amount every month, multiply the amount by the number of months you received it. The result is the total annual amount.
- If you did not receive the same amount each month, add together the amounts you received each month. The result is the total annual amount.

Note: Do not include foster care or adoption payments.

Notes for question 34 (page 3)

You will only have this information if you (or your spouse) submitted a 2025 federal tax return.

- If you and your spouse filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 + Form 1040—line 29 from both tax returns and enter the total amount.
- If you or your spouse will file a federal tax return but haven't yet filed, estimate the amount that will appear in the lines noted above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 35 (page 3)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your (and your spouse's) adjusted gross income (AGI) for 2025.

This is student aid that was part of the student's (and your spouse's) financial aid package but was also considered taxable and included in the student's (and your spouse's) AGI. In most cases, grant and scholarship aid is not reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970.

Student aid types to report may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or childcare payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued while you were in AmeriCorps)

Notes for question 36 (page 3)

Enter the amount of IRA deductions and payments to self-employed SEP, SIMPLE, Keogh, and other qualified plans that you (and your spouse) made in 2025. Round to the nearest dollar and do not include commas or decimal points.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 37 (page 3)

Enter the total amount of tax-exempt interest income you (and your spouse) received in 2025. If you (and your spouse) filed IRS Form 1040, use line 2a.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for questions 38-41 (page 3)

Enter the total amount of the untaxed income or portions you (and your spouse) received in 2025. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

SECTION TWO: STUDENT STATUS DETERMINATION

Notes for questions 44-54 (page 3)

Student status questions help determine if you need to provide parental information on your TASFA. If you answer **yes** to **any** of the student status questions, you do **not** need to include parental information. If you answer **no** to **all** student status questions, then you **must include** parental information and have your parent sign your application.

Notes for question 44 (page 3)

If you were born on January 1, 2004, you should enter **"No."**

Notes for question 45 (page 3)

Report your marital status as of the date you sign your TASFA (enter married if you are separated but not divorced). If your marital status changes after you sign your TASFA, check with the financial aid office at the institution you plan to attend.

Notes for question 46 (page 3)

Answer "Yes" if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.

Answer "No" if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.

Notes for question 47 (page 3)

Answer "Yes" (you are a veteran) if you:

- have engaged in active duty (including basic training) in the U.S. armed forces or are a National Guard or Reserves enlistee who was called to active duty for other than state or training purposes, or served on active or inactive duty for training in the U.S. armed forces and were disabled from an injury incurred or aggravated in the line of duty; and
- were released under a condition other than dishonorable.

Also answer "Yes" if you are not a veteran now but will be one by June 30, 2028**.** Answer "No" (you are not a veteran) if you:

- have never engaged in active duty (including basic training) in the U.S. armed forces,
- are currently a Reserve Officers' Training Corps (ROTC) student or a cadet or midshipman at a service academy,
- are a National Guard or Reserves enlistee activated only for state or training purposes, or

- were engaged in active duty in the U.S. armed forces but released under dishonorable conditions.

Also answer "No" if you are currently serving in the U.S. armed forces and will continue to serve through June 30, 2028.

Notes for question 50 (page 3)

Answer "Yes" if at any time since you turned age 13:

- you had no living parent, even if you are now adopted; or
- you were in foster care, even if you are no longer in foster care today; or
- you were a dependent or ward of the court, even if you are no longer a dependent or ward of the court today. (Someone who is incarcerated is not considered a ward of the court.)

Note: If you are not sure if you were in foster care, check with your state child welfare agency. You can find that agency's contact information at www.childwelfare.gov/nfcad.

The financial aid administrator at your school may require you to provide proof that you were in foster care or a dependent or ward of the court.

Notes for questions 51 & 52 (page 3)

The definition of legal guardianship does not include your parents, even if they were appointed by a court to be your guardians. You are also not considered a legal guardian of yourself.

An emancipated minor is someone who has been legally deemed an adult by a court in his or her state of residence.

Answer "Yes" if you can provide a copy of the court's decision that, as of today, you are an emancipated minor or are in legal guardianship.

Also, answer "Yes" if you can provide a copy of a court's decision that you were an emancipated minor or were in legal guardianship immediately before you reached the age of being an adult in your state. The court must be located in your state of legal residence at the time the court's decision was made.

Answer "No" if you are still a minor and the court decision is no longer in effect or the court decision was not in effect at the time you became an adult.

Note: The financial aid administrator at your school may require you to provide additional information such as a copy of the court's decision.

Notes for questions 53-54 (page 3)

Answer **"Yes"** if you received a determination at any time on or after July 1, 2026, that you were an unaccompanied youth who was homeless or at risk of being homeless.

- "Homeless" means lacking fixed, regular, and adequate housing. You may be homeless if you are living in shelters, parks, motels, hotels, public spaces, camping grounds, cars, abandoned buildings, or temporarily living with other people because you have nowhere else to go. Also, if you are living in any of these situations and fleeing an abusive parent, you may be considered homeless even if your parent would otherwise provide a place to live.
- "Unaccompanied" means you are not living in the physical custody of your parent or guardian.

Answer "No" if you are not homeless or at risk of being homeless, or do not have a determination. However, even if you answer "No," you should contact the financial aid administrator at the college you plan to attend if you are either (1) homeless and unaccompanied or (2) at risk of being homeless, unaccompanied, and providing for your own living expenses, as your college financial aid office can determine that you are "homeless" and are not required to provide parental information.

The financial aid administrator at your college may require you to provide a copy of the determination if you answered "Yes" to any of these questions.

SECTION THREE: PARENT INFORMATION

Notes for questions 55-91 (pages 4-5)

If you answer **no** to **all** the student status questions in Section 2, then you must include parental information and have your parent sign your application.

Legal parents are biological or adoptive (regardless of gender), or as determined by the state (for example, if the parent is listed on the birth certificate). Grandparents, foster parents, legal guardians, widowed stepparents, aunts, uncles, and siblings are not considered parents on this form unless they have legally adopted the student.

Note: If you believe you have a special circumstance in which you are unable to enter parental information when completing the TASFA, it is important for you to notify and work closely with the financial aid office of the institution you plan to attend. In limited circumstances such as the ones listed below, you may be able to submit your TASFA without providing parental information:

- You have left home due to an abusive or threatening family environment.
- You were abandoned by or estranged from your parents.
- You have refugee or asylee status and are separated from your parents, or your parents are displaced in a foreign country.
- You are a victim of human trafficking.
- You are incarcerated, or your parents are incarcerated, and contact with the parents would pose a risk to you.
- You are otherwise unable to contact or locate your parents.

In these special circumstances, it is important for you to understand that financial aid staff may ask for additional information to determine whether you can have an SAI calculated without parental data.

Notes for question 55 (page 4)

Report your legal parents' marital status as of the date you sign your TASFA (enter married if they are separated but not divorced).

- If your parent was never married and does not live with your other legal parent, or if your parent is widowed and not remarried, answer the questions about that parent.
- If your legal parents (biological, adoptive, or as determined by the state [for example, if the parent is listed on the birth certificate]) are not married to each other and live together, select "Unmarried and both legal parents living together" and provide information about both of them, regardless of their gender. Do not include any person who is not married to your parent and who is not a legal or biological parent.

- If your legal parents are married, select "Married" or "Remarried." If your legal parents are divorced but living together, select "Unmarried and both legal parents living together." If your legal parents are separated but living together, select "Married" or "Remarried," not "Divorced" or "Separated."
- If your parents are divorced or separated, answer the questions about the parent who provided more financial support during the past 12 months or during the most recent year that you actually received support from a parent. If both parents provided an exactly equal amount of financial support during the past 12 months, or if they don't support the student financially, answer the questions about the parent with the greater income and assets. If this parent is remarried as of today, answer the questions about that parent and your stepparent.
- If your widowed parent is remarried as of today, answer the questions about that parent and your stepparent.

Notes for question 57 (page 4)

Select the answer that best describes your parents' college completion status. Some financial aid is offered based on the level of schooling your parents completed.

Notes for questions 61 and 67 (page 4)

If your parent has been issued a Social Security card, enter their assigned number. If your parent has been approved for Deferred

Action for Childhood Arrivals (DACA), enter their assigned Social Security number (SSN) through this program. If your parent has an Individual Taxpayer Identification Number (ITIN), enter it.

Notes for questions 63 and 69 (page 4)

Enter each parent's email address. Ensure the email address entered is one they review often and has sufficient storage to receive application updates. Do not enter an email account issued by a college, work or other temporary organization. Please make sure that the email is accurate.

Notes for questions 70 and 71 (page 4)

Enter Parent 1 and Parent 2 (if applicable) 2025 earnings (wages, salaries, tips, etc.), even if a tax return was not filed. This information may be on W-2 forms or on your parents' tax return: IRS Form 1040 (or 1040-NR): Line 1z + Schedule 1: lines 3 + 6.

If any individual earning item on these tax forms is negative, do not include that item in your calculation.

To accurately assess your parents' financial situation, your institution needs to account for all sources of income. In cases where your parents' earnings from employment are at or above the IRS filing threshold requirements, the financial aid office will require that your parents file their taxes before processing your TASFA. Tax filing requirements can be found in the IRS Publication 17, Table 1-1: 2025 Filing Requirements for Most Taxpayers.

Nontax filers: If your parents did not file taxes, contact the financial aid office to see if additional information is needed.

Notes for question 72 (page 4)

If your parents are now married or living together, answer this question about them as a couple. If they are not married and not living together, answer this question about the parent who is reporting financial information on this application.

If you indicate your parents "Will file" a 2025 tax return and their 2025 income is similar to their 2024 income, use their 2024 income tax return to provide estimates for questions about their income.

If your application is selected for review, your college may require you to provide tax transcripts to verify the information you provided on the application.

To access your tax records and transcripts, go to https://www.irs.gov/individuals/get-transcript.

Notes for question 73 (page 4)

If your parent filed or will file a foreign tax return or IRS 1040NR, or a tax return with Puerto Rico, another U.S. territory (e.g., Guam, American Samoa, the U.S. Virgin Islands, Swain's Island, or the Northern Marianas Islands), or one of the Freely Associated States, use the information from that return to fill out this form. If your parent filed a foreign return, convert all monetary units to U.S. dollars, using the published exchange rate in effect for the date nearest to today's date. To view the daily exchange rates, go to federalreserve.gov/releases/h10/current.

Notes for question 74 (page 4)

If a parent filed or will file an IRS Form 1040 tax return, you must select the tax return filing status for 2025 from the "Filing Status" field:

- Single
- Head of household
- Married filing jointly
- Married filing separately
- Qualifying surviving spouse

The "Filing Status" field is located at the top of page one on IRS Form 1040.

Notes for question 76 (page 4)

If your parents filed a 2025 tax return, the AGI can be found on IRS Form 1040—Line 11.

If your parents filed separate tax returns, calculate the total AGI by adding line 11 from both 2025 tax returns and entering the total amount.

If your parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in line 11 of your IRS Form 1040.

If one parent filed a tax return and the other didn't and won't file, add line 11 from the 2025 IRS Form 1040 to your other parent's 2025 income earned from working (for example, earnings from the W-2 form[s] and/or any other earning statements).

Notes for question 77 (page 4)

This question cannot be left blank if your parents filed or will file a 2025 income tax return.

Income tax paid can be found on your 2025 IRS Form 1040—line 24. If negative, enter a zero.

Note: The line numbers above are from the IRS tax form, not from the W-2 form.

Notes for question 78 (page 5)

Add the account balances of your parents' cash, savings, and checking accounts as of today. If the total is negative, enter zero as the total current balance. Do not add student financial aid, retirement accounts, or investments into your account balances. Round to the nearest dollar and do not include commas or decimal points.

Notes for question 79 (page 5)

Net worth means the current value, as of today, of investments, businesses, and/or investment farms minus debts related to those same investments, businesses, and/or investment farms. When calculating net worth, use 0 for investments or properties with a negative value.

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, etc.

Investments also include qualified education benefits or education savings accounts such as Coverdell savings accounts, 529 college savings plans, and the refund value of 529 prepaid tuition plans. If the student is required to report parent information on the TASFA form, parents should not report the value of education savings accounts for other children. Qualified education benefits or education savings accounts must be reported as an asset of the parent if the student is required to report parent information. If the student is not required to report parent information on the TASFA form, the education benefit or savings account is reported as an asset of the student. UGMA and UTMA accounts are considered the assets of the student and must be reported as an asset of the student on the TASFA form, regardless of whether the student is required to report parent information.

Investments do not include the home you live in, 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 already reported.

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.

Notes for question 80 (page 5)

Enter the net worth (current value minus debt) of the current businesses and/or investment farms that your parents own as of today.

Businesses and investment farms include businesses that you own (including a small or family-run business) or income-producing farms that you own (including the fair market value of land, buildings, livestock, unharvested crops, and machinery actively used in investment farms, agricultural, or commercial activities).

Businesses and investment farms do not include the value of crops that are grown solely for consumption by the student and their family or the home in which you live. If the home in which you live is also located on a farm that you own, do not include the net value of that principal residence in the net value of all farm assets. The principal residence may include the home, structures, and land that are adjacent to the home that are not being used, stored, or sold for farming or other commercial activities.

Notes for question 81 (page 5)

Enter the total amount of child support your parents received in 2025 for all children in your household.

- If they received the same dollar amount every month, multiply the amount by the number of months they received it. The result is the total annual amount.
- If they did not receive the same amount each month, add together the amounts they received each month. The result is the total annual amount.

Note: Do not include foster care or adoption payments.

Notes for question 82 (page 5)

Your parents will only have this information if a 2025 federal tax return was submitted.

- If your parents filed separate tax returns, add IRS Form 1040 Schedule 3—line 3 + Form 1040—line 29 from both tax returns and enter the total amount.
- If one or both parents will file a federal tax return, but haven't yet filed, estimate the amount that will appear in the line noted above.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 83 (page 5)

Enter the total amount of grant and scholarship aid reported to the IRS as part of your parents AGI for 2025.

This is student aid that was also considered taxable and included in the parents' AGI. In most cases, grant and scholarship aid is not reported on the tax return as part of your AGI unless the amount you received exceeds your educational expenses (tuition, fees, books, supplies, or equipment). See IRS Publication 970 for more information.

Student aid types to report as part of the AGI may include:

- Grants
- Scholarships
- Waivers/Remissions
- Fellowships/Assistantships (grant or scholarship portions)
- AmeriCorps education awards
- AmeriCorps living allowances (but not insurance or childcare payments)
- AmeriCorps interest accrual payments (for student loan interest that accrued during your AmeriCorps term of service).

Notes for question 84 (page 5)

Enter the total amount of IRA deductions and payments to self-employed SEP, SIMPLE, and Keogh plans that your parents made in 2025. Round to the nearest dollar and do not include commas or decimal points.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for question 85 (page 5)

Enter the total amount of tax-exempt interest income your parents received in 2025.

If your parents filed a tax return: IRS Form 1040 - Use Line: 2a.

Note: The line number references above are from the IRS tax form, not from the W-2 form.

Notes for questions 86-89 (page 5)

Enter the total amount of the untaxed income or portions your parents received in 2025. If the total is a negative amount, enter a zero (0).

A rollover occurs when funds are moved from one eligible retirement plan to another. Example: moving funds from a 401(k) to a Rollover IRA. Check with the IRS for rollover guidance.

Notes for Submitting a Paper Copy TASFA

Each institution may have a different process for receiving paper copy TASFAs. Some institutions may prefer that a paper copy TASFA is mailed directly to the Financial Aid Office and other institutions may prefer that you upload or email a copy through a secure platform. Before submitting or mailing your application, **contact your institution's financial aid office** to clarify the procedure.

If you have filled out a paper copy of the TASFA, you do not need to fill out the online TASFA. You should do one or the other but not both.

If you need assistance calculating college and financial aid amounts, the State Net Price Calculator is available for you to get a better understanding of how much students paid to attend college last year.

For any questions on the submission process or to confirm your TASFA has been received, contact your institution's financial aid office directly.

For more information on the TASFA and frequently asked questions, visit https://www.highered.texas.gov/students-families/tasfa/.