



BERKELEY UNDERGRADUATE DREAM ACT SCHOLARSHIP APPLICATION

SPRING 2012

The California Dream Act of 2011 consists of two bills, Assembly Bill 130 (AB 130) and Assembly Bill 131 (AB 131). AB 130 is effective January 1, 2012, and allows students attending the University of California, Berkeley who are exempt from paying nonresident tuition under another law, Assembly Bill 540 (AB 540), to be eligible to receive the Berkeley Undergraduate Dream Act Scholarship, which is a scholarship from private, non-state funds. The second part of the Dream Act, AB 131, which allows undocumented students exempt from paying nonresident tuition under AB 540 to receive grants and scholarships from state and University sources, goes into effect January 1, 2013.

You must apply to receive the Berkeley Undergraduate Dream Act Scholarship. The Financial Aid and Scholarships Office will begin accepting the Spring 2012 Berkeley Undergraduate Dream Act Scholarship Application on October 31, 2011 to determine students' financial need and eligibility.

Priority deadline for fall semester 2011 students to apply: November 30, 2011

Priority deadline for spring semester 2012 admits and re-admits to apply: we encourage you to apply as soon as possible and no later than March 2, 2012

Privacy Notice: The Family Educational Rights and Privacy Act (FERPA) is a federal law that protects the privacy of student records and prohibits University staff from disclosing information about your financial aid, your campus billing account (CARS), and your registration records to parents or other individuals without your permission.

Tips for Completing the Berkeley Undergraduate Dream Act Scholarship Application:

- Be sure to answer all questions on the application. If the answer is "0" or "not applicable (n/a)," please indicate it on the form. Check all boxes. Do not leave an answer blank.
- If you or your parents do not file a federal tax return, please be sure to complete pages 3 to 5 of this application. You must report any income earned from work and any other untaxed income received.
- If you are a dependent student, both you and your parent are required to sign the application. (If you cannot obtain parental information and your situation meets certain guidelines, you can file an Independence Appeal.)

Important: If you can file a Free Application for Federal Student Aid (FAFSA), please do so to determine financial aid and scholarships for which you are eligible. Please note that if you can file a FAFSA, you are not eligible for the Berkeley Undergraduate Dream Act Scholarship.

In addition to completing the **Berkeley Undergraduate Dream Act Scholarship Application**, we encourage you to apply for private scholarships.

How to Submit Your Application

Email a scanned application to:
 dream@berkeley.edu

Fax it to:
 (510) 643-5526

Mail it to:
 Berkeley Dream Act Scholarship
 210 Sproul Hall #1964
 Berkeley, CA 94720-1964

Drop it off:
 In the Financial Aid Drop Box near 212 Sproul Hall during Sproul Hall business hours



210 Sproul Hall #1964
 Berkeley, CA 94720-1964

Phone: (510) 642-6363 (leave a voicemail message)
 Email: dream@berkeley.edu
 Web: students.berkeley.edu/finaid/undergraduates/types_dream.htm

**Please be sure to read the cover sheet for deadlines,
 how to submit your application, and other important information.**

Completion of this application is required, and it should be submitted with a **signed** copy of your and your parents' Federal 1040, 1040A, or 1040EZ Tax Form, if filed. Please be sure to include all 1040 statements, schedules, and W-2s. We cannot evaluate your eligibility for financial aid until you submit all required verification and documents. If you or your parents do not file a federal tax return, please be sure to complete pages 3 to 5 of this application. You must report any income earned from work and any other untaxed income received.

Name: Last, First _____

Student ID Number _____

I certify that I am exempt from paying nonresident tuition under Assembly Bill 540 (AB 540). If I have not already done so, I will complete and submit the University of California Nonresident Tuition Exemption Form (http://registrar.berkeley.edu/DisplayMedia.aspx?ID=UCTE_for_Elig_CA_HSGrads.pdf).

Yes No

What is your current marital status?

Single Married Divorced/Separated

What is your parents' highest level of education? _____

SECTION I: STUDENT TAX FORM AND INCOME INFORMATION

What was your (and your spouse's) Adjusted Gross Income for 2010? \$ _____

What was your income tax for 2010? \$ _____

What were your tax exemptions? \$ _____

As of today, what is your (and your spouse's) total balance of cash, savings accounts, and checking accounts? \$ _____

SECTION II: STUDENT DEPENDENCY INFORMATION

This section will determine if you are a Dependent or Independent student. If you answer yes to any of the following questions, you will NOT need to provide parental information.

	YES	NO
Were you born before January 1, 1988?	<input type="checkbox"/>	<input type="checkbox"/>
As of today, are you married?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have dependents who receive more than half their support from you?	<input type="checkbox"/>	<input type="checkbox"/>
At any time since you turned 13, were both your parents deceased, or were you in foster care?	<input type="checkbox"/>	<input type="checkbox"/>
Are you an emancipated minor, or in a legal guardianship determined by State Court?	<input type="checkbox"/>	<input type="checkbox"/>
Were you determined to be a homeless youth, or at risk of being homeless by a director of an emergency shelter?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered “No” to ALL of the questions in Section II, you are a Dependent student. Dependent students must fill out Section III. If you cannot obtain parental information and your situation meets certain guidelines, you can file an Independence Appeal.

If you answered “Yes” to any of the questions in Section II, you are an Independent student. Independent students can skip Section III.

SECTION III: PARENT INFORMATION

What are your parents’ dates of birth? Mother _____ Father _____

What is your parents’ current marital status? Married Single Divorced/Separated

What was your parents’ adjusted gross income for 2010? \$ _____

Enter your parents’ income tax for 2010: \$ _____

As of today, what is your parents’ total current balance of cash, savings accounts, and checking accounts? \$ _____

SECTION IV: HOUSEHOLD INFORMATION

Independent Students: Fill out the household verification table by listing yourself, your spouse (if married), and any other dependents you have.

Dependent Students: Include yourself, your parents, and their other dependent children. Include other people only if they will live with and will receive at least half of their support from your parents during the entire period from 7/1/11 to 6/30/12.

Full Name	Age (as of 12/31/11)	Relationship to Student	Name of College (Attending at least Half- Time during 2011-12)	Graduate Student (Y/N)
		Self	UC Berkeley	No

STATEMENT OF EXPENSES AND RESOURCES - Parent or Student

- I am a Dependent student:** Fill out parents' information.
 I am an Independent student: Fill out student's information.

Please itemize both your monthly and yearly expenses and list all sources of income from **January 1, 2010 to December 31, 2010**. Do not include expenses that relate to family businesses, rental property, or college costs for you or your children.

Types of Expenses	Per Month	Per Year
Rent or mortgage payment		
Utilities (gas, electricity, water, phone)		
Insurance (include home, apartment, auto)		
Food		
Transportation (car payments, gas, repairs, public transit)		
Medical/Dental		
Clothing		
Recreation		
Credit card, personal loans, and home equity loan payments		
Other (specify)		
TOTAL EXPENSES:	\$	\$
Types of Resources	Per Month	Per Year
Income from employment - Father (Dependent students only)		
Income from employment - Mother (Dependent students only)		
Income from employment - Student		
Income from employment - Student's Spouse (Independent students only)		
Interest and dividend income		
Unemployment benefits		
Worker's Compensation and/or Disability benefits		
Child support received		
Living allowances paid to military, clergy, and others		
Veteran non-educational benefits		
Social Security benefits		
Temporary Assistance for Needy Families (TANF)		
Food Stamps/WIC/Subsidized Housing		
Foreign income		
Home equity loan distributions, personal loans, and credit card reliance		
Other (specify):		
TOTAL INCOME AND RESOURCES:	\$	\$

PARENT ASSET VERIFICATION - For Dependent students only

Please report asset value for all assets that apply. Only list the percentage you own of the value and debt of assets below. **Attach additional pages if necessary.** Be sure to answer all questions. If the answer is “0” or “not applicable (n/a),” please indicate it. Do not leave an answer blank.

INVESTMENTS

Do not include the value of life Insurance and retirement plans (401[k] plans, pension funds, annuities, non-Education IRAs, Keogh plans). Investments include trust funds, money market funds, mutual funds, certificates of deposit (CD), stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, commodities, Uniform Transfers to Minors Act (UTMA)/Uniform Gifts to Minors Act (UGMA) Custodial Accounts. Partnerships/S corporations—only report asset value if you own less than 50% of business.

Name of Account _____	Total Asset Value \$ _____
Name of Account _____	Total Asset Value \$ _____
Name of Account _____	Total Asset Value \$ _____
Name of Account _____	Total Asset Value \$ _____

BUSINESS AND/OR INVESTMENT FARM - Reference IRS 1040 form Schedule C and/or Schedule F

Do not include family-owned and controlled small businesses (50% or more ownership) with fewer than 100 full-time employees, or farm value if you reside on the property and operate the farm. Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Business debt means only the debts for which the business was used as collateral.

Business/Farm address: _____	
Current market value \$ _____	Current debt owed \$ _____

Business/Farm address: _____	
Current market value \$ _____	Current debt owed \$ _____

REAL ESTATE - Reference IRS Form 1040, Schedule E (Part I)

Do not include your primary residence (your home). Include real estate such as rental property, land, and second or summer homes. The value is the current market value. Debt equals how much your parents owe on the property. Include the value of multifamily dwellings that you own (exclude the portion of a dwelling that is your principal residence). List all properties from IRS Form 1040, Schedule E below:

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

STUDENT ASSET VERIFICATION - For both Dependent and Independent students

I am a Dependent student I am an Independent student

Please report asset value for all assets that apply. Only list the percentage you own of the value and debt of assets below. **Attach additional pages if necessary.** Be sure to answer all questions. If the answer is “0” or “not applicable (n/a),” please indicate it. Do not leave an answer blank.

INVESTMENTS

Do not include the value of life Insurance and retirement plans (401[k] plans, pension funds, annuities, non-Education IRAs, Keogh plans). Investments include trust funds, money market funds, mutual funds, certificates of deposit (CD), stocks, stock options, bonds, other securities, Coverdell savings accounts, 529 college savings plans, commodities, Uniform Transfers to Minors Act (UTMA)/Uniform Gifts to Minors Act (UGMA) Custodial Accounts. Partnerships/S corporations—only report asset value if you own less than 50% of business.

Name of Account _____	Total Asset Value \$ _____
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BUSINESS AND/OR INVESTMENT FARM - Reference IRS 1040 form Schedule C and/or Schedule F

Do not include family-owned and controlled small businesses (50% or more ownership) with fewer than 100 full-time employees, or farm value if you reside on the property and operate the farm. Business or farm value includes the current market value of land, buildings, machinery, equipment, inventory, etc. Business debt means only the debts for which the business was used as collateral.

Business/Farm address: _____	
Current market value \$ _____	Current debt owed \$ _____

Business/Farm address: _____	
Current market value \$ _____	Current debt owed \$ _____

REAL ESTATE - Reference IRS Form 1040, Schedule E (Part I)

Do not include your primary residence (your home). Include real estate such as rental property, land, and second or summer homes. The value is the current market value. Debt equals how much you owe on the property. Include the value of multifamily dwellings that you own (exclude the portion of a dwelling that is your principal residence). List all properties from IRS Form 1040, Schedule E below:

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

Address: _____	
Current market value \$ _____	Current mortgage balance \$ _____

CERTIFICATION STATEMENT

I certify that all the information reported on this form is complete and accurate. I understand that I may be required to provide additional documentation. Purposely providing false or misleading information on this worksheet may result in an investigation by the Center for Student Conduct.

_____ Student Signature	_____ Date	_____ Parent Signature	_____ Date
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