

2010-11 Oregon Opportunity Grant Domestic Partnership Reporting Form

Please complete and return this form only if it applies to you.



You must complete this form **only if you and your partner or your parent and your parent's partner have filed a Declaration of Domestic Partnership with an Oregon county** and are applying for or receiving an Oregon Opportunity Grant. Once completed, return this form to the Oregon Student Assistance Commission (OSAC) at the address shown at the bottom of this page in order for OSAC to recalculate your eligibility for an Oregon Opportunity Grant.

Registered Domestic Partners (RDPs) are same-sex couples who have submitted an official Declaration of Domestic Partnership with a county clerk office in Oregon. If the domestic partnership was filed in a state other than Oregon, the couple must refile in Oregon to be officially recognized. For information on domestic partnerships, contact your local county clerk's office. The State of Oregon provides tax-filing instructions for RDPs that will be helpful in completing portions of this form (see Oregon Department of Revenue publication 150-101-431, pages 17 to 22 for more information).

This reporting form must be completed pursuant to the Oregon Family Fairness Act of 2007 (Act). The Act provides that Registered Domestic Partners have the same rights, benefits and obligations as are granted to or imposed upon spouses in Oregon. *For purposes of financial aid, the State must consider the income and assets of a Registered Domestic Partner of a student or a student's parent in the same manner as it would consider the income and assets of a spouse of a student or student's parent.* These provisions do not affect a student's eligibility for federal financial aid (e.g., Federal Pell Grants or Federal Stafford Loans).

Instructions:

1. In addition to completing this form, you will need to submit a copy of the Declaration of Domestic Partnership that has been filed with a county clerk office in Oregon.
2. **DO NOT SEND** copies of marriage certificates.

Student's Last Name		First Name
Student's Permanent Mailing Address		
City	State	Zip Code
Student's Social Security Number		
Student's Date of Birth	Daytime Telephone Number	

As of today, are you or your parents in a Registered Domestic Partnership? **YES** **NO**
(If you or your parents are legally separated or the domestic partnership has been legally terminated or dissolved, **you do not need to complete this form.**)

I certify under penalty of perjury under the laws of the State of Oregon, that the foregoing is true and correct.

Student's Signature	Date
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Mail completed form and copy of Declaration of Domestic Partnership to: **Oregon Student Assistance Commission
Oregon Opportunity Grant
1500 Valley River Drive, Suite #100
Eugene, Oregon 97401**

2010-11 Oregon Opportunity Grant Domestic Partnership Reporting Form – Page 2

You must notify your school of any financial information change submitted here.

For the following questions, report the income and assets of your partner or, if you are a dependent student, your parent's partner. Together with information from your FAFSA record this information will be used to determine your eligibility for an Oregon Opportunity Grant and your grant award amount. If you and your partner or, if applicable, your parent and parent's partner, filed a 2009 Oregon income tax return as registered domestic partners, information from that form may help you complete the following questions.

1. What was your partner's or parent's partner's adjusted gross income for 2009? <i>Adjusted Gross Income is on IRS Form 1040-line 37; 1040A-line 21 or 1040EZ-line 4; compare also FAFSA question 36.</i>	\$ _____
2. Enter the total amount of your partner's or parent's partner's income tax for 2009. <i>Income Tax Amount is on IRS Form 1040-line 56; 1040A-line 35 or 1040EX-line 11; compare also FAFSA question 37</i>	\$ _____
3. Enter your partner's or parent's partner's exemptions for 2009. <i>Exemptions are on IRS Form 1040 on 1040A-line 6d; for 1040EZ – see page 2; compare also FAFSA question 38</i>	\$ _____
4. How much did your partner or parent's partner earn from working (wages, salaries, tips, etc.) in 2009? <i>Answer this question whether or not your partner or parent's partner filed a tax return. This information may be on the W-2 forms or on IRS Form 1040-lines 7+12+18; 1040A-line 7; or 1040EZ-line 1. Compare also FAFSA questions 39 and 40.</i>	\$ _____
5. As of today, what is your partner's or parent's partner's total current balance in cash, savings, and checking accounts? <i>Compare FAFSA question 41</i>	\$ _____
6. As of today, what is the net worth of your partner's or parent's partner's investments, including real estate (not including their primary home)? <i>Net worth means current value minus debt. Compare FAFSA question 42.</i>	\$ _____
7. As of today, what is the net worth of your partner's or parent's partner's current business and/or investment farms? <i>Net worth means current value minus debt. Do not include a farm that you and your partner or parent's partner live on and operate. Compare FAFSA question 43</i>	\$ _____

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

Section A. For Independent Students — Student's and Student's Partner's Household Size (see FAFSA questions 94 and 95)	
Include in the household: <ul style="list-style-type: none"> • yourself and your partner • your and your partner's children if between you more than half of their support will be provided from July 1, 2010, through June 30, 2011, other people if they now live with you and your partner, and you provide more than half of their support and you will continue to provide more than half of their support from July 1, 2010, through June 30, 2011. 	_____
Of the persons included in the household, how many will be college students attending at least half time between July 1, 2010, and June 30, 2011? Always count yourself as a college student. Include others only if they will attend at least half time in 2010-11, in a program that leads to a college degree or certificate.	_____
Section B. For Dependent Students — Parent and Parent's Partner's Household Size (see FAFSA questions 73 and 74)	
Include in the household: 1. your parent and your parent's partner and yourself, even if you don't live with your parent 2. your parent's and your parent's partner's other children if: 1. your parent and your parent's partner will provide more than half of their support from July 1, 2009 through June 30, 2010, OR 2. the children would answer " No " to ALL of the following statements: • They were born before January 1, 1987. • As of today, the children are married. Answer "Yes" if separated but not divorced. • The children have children for whom they provide more than half of their support. • Both of the children's parents are deceased. 3. other people if they now live with you and your partner, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2010, through June 30, 2011.	_____
Of the persons included in the household, how many will be college students attending at least half time between July 1, 2010, and June 30, 2011? Always count yourself as a college student. Do not include your parent or your parent's partner. Include others only if they will attend at least half time in 2010-11, in a program that leads to a college degree or certificate.	_____

2010-11 Oregon Opportunity Grant Domestic Partnership Reporting Form – Page 3

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All income and benefits refer to amounts received during the 2009 tax year.

Independent Student & Student's Partner (Question 44)	2009 Additional Financial Information (Enter the combined amounts for both partners)	Dependent Parent & Parent's Partner (Question 92)
\$ _____	a. Education credits (Hope & Lifetime Learning tax credits or American Opportunity Credits) from IRS Form 1040–line 50 or 1040A–line 31.	\$ _____
\$ _____	b. Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your (or your parent's) household.	\$ _____
\$ _____	c. Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.	\$ _____
\$ _____	d. Student grant and scholarship aid reported to the IRS in your adjusted gross income. Includes AmeriCorps benefits (awards, living allowances and interest accrual payment), as well as grant and scholarship portions of fellowships and assistantships.	\$ _____
\$ _____	e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	\$ _____

Independent Student & Student's Partner (Question 45)	2009 Untaxed Income (Enter the combined amounts for both partners)	Dependent Parent & Parent's Partner (Question 93)
\$ _____	a. Payments to tax-deferred pension and savings plans (paid directly or withheld from earnings), including, but not limited to, amounts reported on the W-2 forms in Boxes 12a through 12d, codes D, E, F, G, H and S.	\$ _____
\$ _____	b. IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040–line 28 + line 32 or 1040A–line 17.	\$ _____
\$ _____	c. Child support received for all children. Don't include foster care or adoption payments.	\$ _____
\$ _____	d. Tax exempt interest income from IRS Form 1040–line 8b or 1040A–line 8b.	\$ _____
\$ _____	e. Untaxed portions of IRA distributions from IRS Form 1040–lines (15a minus 15b) or 1040A–lines (11a minus 11b). Exclude rollovers. If negative, enter a zero here.	\$ _____
\$ _____	f. Untaxed portions of pensions from IRS Form 1040–lines (16a minus 16b) or 1040A–lines (12a minus 12b). Exclude rollovers. If negative, enter zero here.	\$ _____
\$ _____	g. Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits).	\$ _____
\$ _____	h. Veterans noneducation benefits such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.	\$ _____
\$ _____	i. Other untaxed income not reported, such as workers' compensation, disability, etc. Don't include student aid, earned income credit, additional child tax credit, welfare payments, untaxed Social Security benefits, Supplemental Security Income, Workforce Investment Act educational benefits, combat pay if you are not a tax filer, benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels..	\$ _____
\$ _____	j. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form.	\$ _____