

## Parent Income & Resource Certification

Office of Student Financial Services  
P. O. Box 20036 • Houston, TX 77225  
(713) 500-3860 phone • (713) 500-3863 fax  
<https://www.uth.edu/sfs/>

Student ID

|  |  |  |  |  |  |  |  |
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Loans for Disadvantaged Students (LDS) and Health Professions Student Loans (HPSL) are need-based federal loan programs that provide long-term, low-interest rate loans to full-time students from disadvantaged backgrounds pursuing a Doctor of Medicine (MD) or Doctor of Dental Surgery (DDS) degree. The Health Resources and Services Administration and Bureau of Health Professions fund the LDS and HPSL programs which are offered on a first come, first served basis to those who qualify.

Applicants must submit the Parent Income & Resource Certification form and parental tax information for determination of eligibility, regardless of the student's age or marital status. Unless the parents are deceased, a student who does not provide parent information will not be considered for LDS or HPSL funds. If parents are deceased, please provide documentation (i.e., death certificate).

DDS students that do not qualify for the LDS loan will automatically be screened for the Health Professions Student Loan. The HPSL loan is not available to MD students.

### Parent Data Determination

- Married/Remarried Parents: Include information for both parents/stepparents even if they filed separate tax returns.
- Unmarried Parents living together that were never married, divorced or separated: Include information for both parents.
- Divorced, Separated and not living together or Single Parents that never married: Include the information for the parent who provided more financial support during the past 12 months. If either parent does not support the student financially, include the information for the parent with the greater income and assets.
- Widowed parents: Include the information for the living parent and provide a copy of the death certificate for the deceased parent.

When necessary, submit a separate form for both parents.

Submit forms using **ONE** of the following methods:

1. **Online:** Log on to **myUTH**, click on the **To Do List** item, select **Submit** button and follow instructions.
2. **In Person:** UCT Building, 7000 Fannin, Suite 2220, Houston, TX 77030

### A. STUDENT DATA

Student Last Name \_\_\_\_\_ First Name \_\_\_\_\_ Middle Initial \_\_\_\_\_

☐ DDS  
☐ MED

### B. PARENT DATA

#### PARENT 1

#### PARENT 2

|   |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
|---|-------------------------|--------------------|----------------|--|--|--|---------------|-------------------------|--------------------|--|--|--|---|-----------|------------|----------------|--|--|--|---------------|-------------------------|--------------------|--|--|--|
| <table style="width: 100%; border-bottom: 1px solid black;"> <tr> <td style="width: 33%;">Last Name</td> <td style="width: 33%;">First Name</td> <td style="width: 33%;">Middle Initial</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table> <table style="width: 100%; border-top: 1px solid black; border-bottom: 1px solid black;"> <tr> <td style="width: 33%;">Date of Birth</td> <td style="width: 33%;">Relationship to student</td> <td style="width: 33%;">State of Residency</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table> | Last Name               | First Name         | Middle Initial |  |  |  | Date of Birth | Relationship to student | State of Residency |  |  |  | <table style="width: 100%; border-bottom: 1px solid black;"> <tr> <td style="width: 33%;">Last Name</td> <td style="width: 33%;">First Name</td> <td style="width: 33%;">Middle Initial</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table> <table style="width: 100%; border-top: 1px solid black; border-bottom: 1px solid black;"> <tr> <td style="width: 33%;">Date of Birth</td> <td style="width: 33%;">Relationship to student</td> <td style="width: 33%;">State of Residency</td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table> | Last Name | First Name | Middle Initial |  |  |  | Date of Birth | Relationship to student | State of Residency |  |  |  |
| Last Name   | First Name              | Middle Initial     |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
|   |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
| Date of Birth   | Relationship to student | State of Residency |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
|   |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
| Last Name   | First Name              | Middle Initial     |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
|   |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
| Date of Birth   | Relationship to student | State of Residency |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
|   |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |
| <div style="display: flex; justify-content: space-between;"> <div><input type="checkbox"/> Married _____<br/>Date</div> <div><input type="checkbox"/> Separated _____<br/>Date</div> <div><input type="checkbox"/> Divorced _____<br/>Date</div> <div><input type="checkbox"/> Widowed _____<br/>Date</div> </div>  |                         |                    |                |  |  |  |               |                         |                    |  |  |  |   |           |            |                |  |  |  |               |                         |                    |  |  |  |

Last Name

First Name

Middle Initial

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**C. PARENT FAMILY SIZE**

List below the people included in the parent's family size including the UT student even if they do not live with you or you do not support them. With the exception of including the UT student, family size should align with the requirement of those whom the parent could claim as a dependent on a U.S. tax return for the tax year ending in 2022.

| Full Name of Household Member | Age | Relationship to Parent | College Attending |
|-------------------------------|-----|------------------------|-------------------|
|                               |     | <i>Self</i>            |                   |
|                               |     | <i>Spouse</i>          |                   |
|                               |     | <i>UT Student</i>      |                   |
|                               |     |                        |                   |
|                               |     |                        |                   |
|                               |     |                        |                   |

If more space is needed, attach a separate page

**D. PARENT TAX FILING STATUS**

Have the parents (listed in Section B) filed or intend to file a 2022 Federal Income Tax Return with the IRS or an equivalent foreign government tax form?

Check the applicable box:

☐ YES, Proceed to Section E☐ NO, Skip to Section F**E. PARENT TAX FILER**

Parent filers of Federal Income Tax Returns with the IRS or a foreign government's tax form equivalent, must indicate the type of form filed and provide a *signed* copy of the document.

Check the applicable box:

- ☐ 2022 U.S. Federal Income Tax Return Transcript **and** W-2/1099 form(s)
- ☐ 2022 U.S. Federal Income Tax Return with applicable schedules **and** W-2/1099 form(s)
- ☐ Foreign government tax form equivalent

**Skip to Section H****F. PARENT TAX NON FILER**

Parents that will not file and are not required to file a 2022 Federal Income Tax Return with the IRS or a foreign government tax form equivalent, must complete this section.

Check the applicable box:

- ☐ Neither parent was employed nor had any income earned from work in 2022
- ☐ One or both parents were employed in 2022, will not file and are not required to file a 2022 Federal Income Tax form with the IRS or foreign government tax form equivalent.

Complete the box below, if applicable:

Provide copies of all 2022 IRS W-2 or equivalent forms issued to the parents by their employer(s).  
List every employer even if the employer did not issue an IRS W-2 form or equivalent.

| Employer's Name | Annual Amount Earned in 2022 | IRS W-2 or equivalent Forms Provided? |    |
|-----------------|------------------------------|---------------------------------------|----|
|                 |                              | Yes                                   | No |
|                 |                              | Yes                                   | No |
|                 |                              | Yes                                   | No |
|                 |                              | Yes                                   | No |
|                 |                              | Yes                                   | No |
|                 |                              | Yes                                   | No |

If more space is needed, attach a separate page

**Proceed to Section G**

|  |  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|--|
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**G. PARENT INCOME AND ASSETS**

List all sources of earned and untaxed income and benefits that you and your spouse (if married) received in 2022.

If earnings are from outside the United States, all earnings must be converted to U.S. Dollars. Enter "0" when appropriate. Do not leave any items blank. Provide copies of all IRS Form 1099s and W-2s or equivalent forms issued to you and your spouse (if married) by your employer in 2022.

**Annual Income and Asset Earnings for Tax Year ending 2022**

|   |    |     |
|---|----|-----|
| Earned Income (wages, salaries, tips, etc.) – Parent 1  | \$ | (a) |
| Earned Income (wages, salaries, tips, etc.) – Parent 2  | \$ | (b) |
| Untaxed Unemployment Compensation   | \$ | (c) |
| Supplemental Nutrition Assistance Program (SNAP)  | \$ | (d) |
| Temporary Assistance for Needy Families (TANF)  | \$ | (e) |
| Special Supplemental Nutrition Program for Women, Infants and Children (WIC)  | \$ | (f) |
| <input type="checkbox"/> Social Security <input type="checkbox"/> Disability Benefits   | \$ | (g) |
| Child Support <i>received</i> for all children  | \$ | (h) |
| Other untaxed income and/or earnings<br>Source: _____<br>Source: _____  | \$ | (i) |
| Total <i>current</i> balance of cash, savings and checking accounts   | \$ | (j) |
| Net worth of investments, including real estate <i>(not your primary residence)</i><br>Net worth means current value minus debt | \$ | (k) |
| Net worth of current business and/or investment farms<br>(Do not include a farm on which you live and operate)                  | \$ | (l) |
| <b>TOTAL</b> Add columns (a) through (l)  | \$ |     |

**H. CERTIFICATION AND SIGNATURE**

Signing below certifies the information reported on this worksheet is complete and correct. The student and each parent whose information was reported on this form must sign and date below.

 Parent 1 Signature *(digital signatures not accepted)*

Parent 1 Name (printed)

Date

 Parent 2 Signature *(digital signatures not accepted)*

Parent 2 Name (printed)

Date

 Student Signature *(digital signatures not accepted)*

Student Name (printed)

Date