



# 2024-2025 College Financial Data Form

As we begin the process of identifying our fit together, please bring the following items and complete the data form below:

- Student's and Parent's Drivers License
- W2's for both student and parent from most recent tax year.
- Most recent Federal Tax Form 1040 for student and parents
- Current bank statements
- Current mortgage information
- If you own a business, your business tax return
- Investment statements

Client Name: \_\_\_\_\_

Parent Email Address: \_\_\_\_\_  
(For parent correspondence)

Student Email Address: \_\_\_\_\_

## Section One: Student Information

- |  |  |
|--|--|
| 1. Student's FULL Name: _____  | 12. Is the student married? <b>Y / N</b><br>If yes, please complete 13a-c                                |
| 2. Gender: <b>M / F</b>  |  |
| 3. Street Address: _____<br>Enter the address where the student lives most of the year | 13a. Student's Spouse's Name: _____  |
|  | b. Spouse's Date of Birth: _____   |
|  | c. Spouse's SSN: _____   |
| 4. City, State, ZIP: _____   | 14. Does the Student have Children? <b>Y / N</b><br>If yes, number of children: _____                    |
| 5. Home Telephone: _____   |  |
| 6. Student's SSN: _____  | 15. Has the student ever been convicted of a drug offenses? <b>Y / N</b>                                 |
| 7. Student's Date of Birth: _____<br>(MM/DD/YYYY)                                      | 16. Date of State Residency: _____<br>(MM/DD/YYYY)   |
| 8a. Student's High School: _____   | 17. Standardized Test Scores   |
| b. Type of School <b>Public / Private</b>  | SAT Verbal/Critical Reading: _____   |
|  | SAT Math: _____  |
| 9. High School Grad year: _____  | SAT Writing: _____   |
|  | ACT: _____   |
| 10a. Driver's License No.: _____   | 18. If the student is male and is at least age 18, is he registered with Selective Service? <b>Y / N</b> |
| b. State: _____  |  |
| 11. Is the student a US citizen? <b>Y / N</b><br>If no, enter Alien Reg. No. _____     |  |

## Section Two: Student Income & Benefit Information

Please note: Estimates are perfectly acceptable. We always use estimates to complete the financial aid forms so that the student is first in line pertaining to financial aid. You can use last year's figures as a reference.

19. **Student's Tax Status for 2023:**

☐

Already filed

☐

Will file, but have  
not completed

☐

Will not file

20. Student's Earned Income: \$ \_\_\_\_\_  
(W-2 Wages)

21. Student's Unearned Income: \$ \_\_\_\_\_  
Interest, Dividends, etc.

22. Student's Adjusted Gross Income: \$ \_\_\_\_\_

23. Itemized Deductions: \$ \_\_\_\_\_

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24. **Untaxed Income & Benefits:**

a. Student's Contribution to  
IRA/Tax Deferred Plans: \$ \_\_\_\_\_

b. Social Security Benefits: \$ \_\_\_\_\_

c. Other Untaxed Income:  
(Specify) \_\_\_\_\_ \$ \_\_\_\_\_

## Section Three: Parent & Family Information

### Father's Information

25. Father's Full Name: \_\_\_\_\_  
Enter N/A if not applicable
26. Father's Date of Birth: \_\_\_\_\_
27. Father's SSN: \_\_\_\_\_
28. Father's Occupation: \_\_\_\_\_
29. Father's Employer: \_\_\_\_\_
30. Number of years with employer: \_\_\_\_\_
31. Work Phone Number: \_\_\_\_\_  
Cell Phone Number: \_\_\_\_\_
32. Father's Highest Educational Level: \_\_\_\_\_
- 33a. Have you changed jobs in the last 5 years? **Y / N**  
b. Do you plan to? **Y / N**

### Mother's Information

34. Mother's Full Name: \_\_\_\_\_  
Enter N/A if not applicable
35. Mother's Date of Birth: \_\_\_\_\_
36. Mother's SSN: \_\_\_\_\_
37. Mother's Occupation: \_\_\_\_\_
38. Mother's Employer: \_\_\_\_\_
39. Number of years with employer: \_\_\_\_\_
40. Work Phone Number: \_\_\_\_\_  
Cell Phone Number: \_\_\_\_\_
41. Mother's Highest Educational Level: \_\_\_\_\_
- 42a. Have you changed jobs in the last 5 years? **Y / N**  
b. Do you plan to? **Y / N**

### Family Information

43. Parent's Marital Status: \_\_\_\_\_
- |                     |       |
|---------------------|-------|
| Married / Remarried | _____ |
| Separated           | _____ |
| Divorced            | _____ |
| Widowed             | _____ |
| Never Married       | _____ |
44. Date: (MM/DD/YYYY) \_\_\_\_\_
45. Parent's date of state residency: \_\_\_\_\_  
(MM/DD/YYYY)
46. Number in College 2024-25 school year: \_\_\_\_\_  
Enter the number of family members who will attend college at least halftime for one or more academic periods in the 2024-2025 school year.  
**Always include the student. DO NOT include parents.**
47. Number in Household: \_\_\_\_\_
48. Pre-College children: \_\_\_\_\_  
Number of pre-college children in household  
(do not include student)
49. Do you own your home? **Y / N**
50. How would you describe your credit rating? **Excellent / Good / Fair / Poor**
- 51a. Do you have a will? **Y / N**  
b. Date will was signed: \_\_\_\_\_

## 2023 Parents Income and Benefit Information

**Please note:** Estimates are perfectly acceptable. We always use estimates to complete the financial aid forms so that the student is first in line pertaining to financial aid. You can use last year's figures as a reference.

|   |   |
|---|---|
| 55. Father's Earned Income: \$ _____<br><i>Box 1, W-2</i> (W-2 wages only)              | 65. <u>Elementary/Secondary School Tuition</u><br><br><b>For the student-</b><br>a. Parent's contribution: \$ _____<br>b. Tuition scholarships/grants: \$ _____ |
| 56. Mother's Earned Income: \$ _____<br><i>Box 1, W-2</i> (W-2 wages only)              | <b>All other siblings-</b><br>c. Parent contribution: \$ _____<br>d. Tuition scholarships/grants: \$ _____  |
| 57. Parent's Other Taxable Income: \$ _____<br>Business, Self-Employment, or Schedule C | 66. Un-reimbursed Medical/Dental Expenses: \$ _____<br><b>DO NOT include health ins premiums!</b>   |
| 58. IRA Contributions: \$ _____   | 67. Child Support Paid: \$ _____  |
| 59. Contributions to Retirement Accts.: \$ _____<br>401(k), 403(b), etc.                | 68. Child Support Received: \$ _____  |
| 60. Untaxed Social Security Benefits: \$ _____  | 69. Worker's Compensation: \$ _____   |
| 61. Parent's Adjusted Gross Income: \$ _____  | 70. Unemployment Benefits: \$ _____   |
| 62. Itemized deductions: \$ _____   | 71. Housing Allowance: \$ _____<br>Housing, food, and other living allowances paid to members of the clergy, military, and others.                              |
| 63. Other Untaxed Income: \$ _____<br>(Specify) _____                                   |   |
| 64. Total income tax: \$ _____  |   |

## 2024 Asset Information Summary

\*\*List Retirement Account information in the identified section below\*\*  
Please include UTMA/UGMA (custodial accounts) as student assets

|  | <b>Parent(s)</b> |             | <b>Student</b>                                 |             | <b>Sibling(s)</b> |             |
|--|------------------|-------------|--|-------------|-------------------|-------------|
|  | <u>Value</u>     | <u>Debt</u> | <u>Value</u>                                   | <u>Debt</u> | <u>Value</u>      | <u>Debt</u> |
| 72. Cash, Checking, Savings:           | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 73. Certificates of Deposit:           | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 74. Treasury Bills:                    | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 75. Money Market Funds:                | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 76. Mutual Funds:                      | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 77. Stocks:                            | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 78. Bonds:                             | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 79. Tax Exempt Bonds:                  | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 80. Annuities (non-qualified):         | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 81. Trust Funds:                       | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 82. Limited Partnerships:              | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 83. Business Assets:                   | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 84. Farm Assets:                       | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |
| 85a. Do you live on farm? <b>Y / N</b> |                  |             | 85b. Did you file IRS Schedule F? <b>Y / N</b> |             |                   |             |
| 86. Pre-paid Tuition Accts./529s:      | \$ _____         |             | \$ _____                                       |             | \$ _____          |             |
| 87. Other Assets: _____                | \$ _____         | \$ _____    | \$ _____                                       | \$ _____    | \$ _____          | \$ _____    |

## Retirement Asset Information

Enter net asset value (asset value – asset debt)

88.

### RETIREMENT ACCOUNT(S) SUMMARY

#### TOTAL VALUE

|                        | <u>Father</u> | <u>Mother</u> |
|------------------------|---------------|---------------|
| IRA:                   | \$ _____      | \$ _____      |
| 401(k):                | \$ _____      | \$ _____      |
| 403(b):                | \$ _____      | \$ _____      |
| Pension Fund:          | \$ _____      | \$ _____      |
| Annuities (qualified): | \$ _____      | \$ _____      |
| Rollover:              | \$ _____      | \$ _____      |
| Keogh/SEP/Simple:      | \$ _____      | \$ _____      |
| Monthly Contribution:  | \$ _____      | \$ _____      |
| (\$ or % amt.)         | % _____       | % _____       |
| Employer Match:        | \$ _____      | \$ _____      |
| (\$ or % amt.)         | % _____       | % _____       |

89.

### ASSETS: HOME

Purchase Price: \$ \_\_\_\_\_ Year of Purchase: \_\_\_\_\_ Present Value: \$ \_\_\_\_\_

\*If you own additional real estate, please list on separate sheets.

Years Remaining: \_\_\_\_\_ Interest Rate: \_\_\_\_\_

|  |  |
|--|--|
|  |  |
|--|--|

90.

### Liabilities (Debt)

| <u>Type</u>   | <u>Monthly Payment</u> | <u>Current Balance</u> |
|---|------------------------|------------------------|
| 1 <sup>st</sup> Mortgage (Principal/Interest Only): | \$ _____               | \$ _____               |
| 2 <sup>nd</sup> Mortgage:                           | \$ _____               | \$ _____               |
| Home Equity/Line of Credit:                         | \$ _____               | \$ _____               |
| Car Loans:  | \$ _____               | \$ _____               |
| Credit Cards:                                       | \$ _____               | \$ _____               |
| Other Debt:   | \$ _____               | \$ _____               |
| Term Insurance:                                     | \$ _____               |                        |

91. **Family Member Listing** – Give Information for all family members. List up to six family members.  
**Always include the student and the parent(s)**

| Full Name of Family member | Date of Birth<br>(mm/dd/yyyy) | Name of School or College<br>(2020 - 2021 School Year) | Public or<br>Private? | Claimed by parent(s) as<br>tax exemption for 2020? | Year in<br>School |
|----------------------------|-------------------------------|--|-----------------------|--|-------------------|
|                            |                               |  |                       | Y / N  |                   |
|                            |                               |  |                       | Y / N  |                   |
|                            |                               |  |                       | Y / N  |                   |
|                            |                               |  |                       | Y / N  |                   |
|                            |                               |  |                       | Y / N  |                   |
|                            |                               |  |                       | Y / N  |                   |

## 2024 Expected Income and Resources Information

|   |                         |   |          |
|---|-------------------------|---|----------|
| 92. Father's Earned Income:             | \$ _____                | 100. Student's Untaxed Income & Benefits    |          |
| <b>Box 1, W-2</b>                       | <b>(W-2 wages only)</b> | a. Summer 2024 (3 months):                  | \$ _____ |
|   |                         | b. School year 2024-25 (9 months):          | \$ _____ |
| 93. Mother's Earned Income:             | \$ _____                | 101. Student's Untaxed Income & Benefits:   | \$ _____ |
| <b>Box 1, W-2</b>                       | <b>(W-2 wages only)</b> |   |          |
| 94. Parent's Other Taxable Income:      | \$ _____                | 102. Grants, scholarships, fellowships from |          |
|   |                         | sources other than the colleges to          |          |
| 95. Parent's Untaxed Income & Benefits: | \$ _____                | which the student is applying:              | \$ _____ |
| 96. Parent's Income Taxes Paid:         | \$ _____                | 103. Employer Tuition Benefits for student  |          |
|   |                         | a. From Student's employer:                 | \$ _____ |
| 97. Student's Earned Income             |                         | b. From Parent's employer:                  | \$ _____ |
| a. Summer 2024 (3 months):              | \$ _____                |   |          |
| b. School year 2024-25 (9 months):      | \$ _____                | 104. Other expected amounts for 2024-25     |          |
|   |                         | a. Pre-Paid Tuition Account withdrawals:    | \$ _____ |
| 98. Student Spouse's Earned Income      |                         | b. Relatives:                               | \$ _____ |
| a. Summer 2024 (3 months):              | \$ _____                | c. Student's Spouse's Parents:              | \$ _____ |
| b. School year 2024-25 (9 months):      | \$ _____                | d. All other sources: _____                 | \$ _____ |
|   |                         | (specify)                                   |          |
| 99. Student's Other Taxable Income      |                         |   |          |
| a. Summer 2024 (3 months):              | \$ _____                |   |          |
| b. School year 2024-25 (9 months):      | \$ _____                |   |          |



108. On a MONTHLY BASIS: How much can you comfortably contribute towards your student's college expenses? \$

*Please do not put zero*



109. On a MONTHLY BASIS: How much can you comfortably contribute towards all of your children's college expenses? \$

*Please do not put zero*



110. **Student's College Choices:**

| College/University: | City  | State/Prov. |
|---------------------|-------|-------------|
| 1. _____            | _____ | _____       |
| 2. _____            | _____ | _____       |
| 3. _____            | _____ | _____       |
| 4. _____            | _____ | _____       |
| 5. _____            | _____ | _____       |
| 6. _____            | _____ | _____       |
| 7. _____            | _____ | _____       |
| 8. _____            | _____ | _____       |
| 9. _____            | _____ | _____       |
| 10. _____           | _____ | _____       |
| 11. _____           | _____ | _____       |
| 12. _____           | _____ | _____       |

111.

**Comments or Special Circumstances**

List any items that would change or create an incorrect financial Snapshot from the information provided in the above sheets. *Example: a change of or loss of employment.*

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