



**CAMPUS ADVISERS--What will college really cost us? Complete this form...**

Student Name \_\_\_\_\_ Cum. GPA \_\_\_\_\_ Date \_\_\_\_\_

Student Name \_\_\_\_\_ Cum. GPA \_\_\_\_\_ Date \_\_\_\_\_

**Parent #1/Dad or Parent #2/Mom – We must differentiate income figures for calculation purposes. In some cases, such as a divorce or re-marriage, it becomes confusing whose income is requested by financial aid forms. We need the income of the parent (including step-parent) that the student lives with most of the time. Example: if student lives with mom and step-dad...Parent #1/Dad would be step-dad's income, Parent #2/Mom would be mom's income. If the parent is single, leave one field blank. If one parent does not produce an income, leave the field blank.**

Parent #1/Dad's Name \_\_\_\_\_ Parent #2/Mom's Name \_\_\_\_\_

Student Age: \_\_\_\_\_ Mother's Age: \_\_\_\_\_ Father's Age: \_\_\_\_\_ # to be in College: \_\_\_\_\_ # of siblings \_\_\_\_\_

**Estimated STUDENT's Income for Calendar Year "preceding" High School graduation**

W2/Earned Income \_\_\_\_\_ Interest/Dividend Income \_\_\_\_\_ Social Security (if any) \_\_\_\_\_

**Estimated PARENT's Income for Calendar Year "preceding" High School graduation**

Amt. Saving for College Now \$ \_\_\_\_\_/Yr. Max Amt. able to contribute for college \$ \_\_\_\_\_/Yr.

Parent 1/Dad (W2 or net business) \$ \_\_\_\_\_ Parent 2/Mom (W2 or net bus.) \$ \_\_\_\_\_

Total of All Other Taxable Income(s) \$ \_\_\_\_\_ Business Profit/Loss, if any \$ \_\_\_\_\_

Adjusted Gross Income (AGI: Form 1040 – bottom line of Page 1) \$ \_\_\_\_\_

Contributions to all Retirement Accounts/year for both parents (If 401k, see W2 Box 12) \$ \_\_\_\_\_

Total Untaxed Income (soc. security, child support, etc) \$ \_\_\_\_\_ Monthly Mortgage(s) \$ \_\_\_\_\_

# of Family Members in Household \_\_\_\_\_ Fed. Income Tax Paid \$ \_\_\_\_\_

**Student's Assets**

**Parents' Assets**

Checking & Savings Total \_\_\_\_\_

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CDs \_\_\_\_\_ Stocks \_\_\_\_\_

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Bonds (EE, I or bond funds) \_\_\_\_\_

Mutuals/Bond/529 Funds \_\_\_\_\_

Mutual funds (UGMA/UTMA) \_\_\_\_\_

IRAs \_\_\_\_\_ 401(k) \_\_\_\_\_

Total Assets in Siblings' Names \_\_\_\_\_

Home Value \_\_\_\_\_ Mortgage(s) \_\_\_\_\_

Trust or Conservator Acct \_\_\_\_\_

Rental/Invest. Property EQUITY \_\_\_\_\_

Top Colleges Interested at this time for Student

Business Value \_\_\_\_\_ LLC, Corp, Sole P ?

1) \_\_\_\_\_ 2) \_\_\_\_\_

Life Insurance \_\_\_\_\_ cash value \$ \_\_\_\_\_

3) \_\_\_\_\_ 4) \_\_\_\_\_

Car loan debt \_\_\_\_\_ Credit card debt \_\_\_\_\_