

**College Planning Group**  
**600 Chapman Street, Suite 3**  
**Canton MA 02021**  
**7 8 1 - 8 2 8 - 1 1 1 4 office**  
**7 8 1 - 8 2 8 - 1 7 7 5 fax**



Please use your family's most recent Federal Income Tax Returns and current financial information to complete this form. Please answer all applicable questions accurately and completely, using asset and income information from the student's current household ONLY (data from the student's natural parents, step-parents, or combination of both).

**SECTION 1 – STUDENT GENERAL INFORMATION**

- 1. SS #: Leave blank
- 2. Last Name: \_\_\_\_\_ 3. First: \_\_\_\_\_ 4. MI: \_\_\_\_\_
- 5. Address: \_\_\_\_\_
- 6. City: \_\_\_\_\_ 7. State: \_\_\_\_\_ 8. Zip: \_\_\_\_\_
- 9. Email: \_\_\_\_\_ 10. Phone: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_
- 11. Date of Birth: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_ 12. Gender: Male Female
- 13. High School Graduation Year: \_\_\_\_\_
- 14. Was the Student Born Before January 1, 1985? YES NO
- 15. At the Beginning of the 2008-2009 School Year, Will the Student Be Working on a Master's or Doctorate Program, Such as an MA, MBA,, MD, JD, PhD, EdD, Graduate of Certificate, etc.? YES NO
- 16. Is the Student Married? YES NO
- 17. Does the Student Have Children Who Receive More than Half Of Their Support from the Student? YES NO
- 18. Does the Student Have Dependents (other than children or spouse) Who Live With the Student and Receive More Than Half of Their Support From the Student, now and Through June 30, 2009? YES NO
- 19. Are Both of the Student's Parents Deceased, or is the Student (or was the student until age 18) a Ward / Dependent of the Court? YES NO
- 20. Is the Student Currently Serving on Active Duty in the U.S. Armed Forces for Purposes Other Than Training? YES NO
- 21. Is the Student a Veteran of the U.S. Armed Forces? YES NO

Dependency Status – If ALL Questions 14 – 21 are answered NO student is “DEPENDENT” and applicable Parent Information must be reported. If ANY Question (14 – 21) is answered YES the student is considered “INDEPENDENT” and Parent Information is omitted.





### SECTION 3 – FAMILY INFORMATION (DEPENDENT STUDENT ONLY)

1. Total # of Family Members \_\_\_\_\_ 2. Student(s) Attending College: \_\_\_\_\_

3. Parent(s) Attending College: \_\_\_\_\_ 4. Children NOT Attending College: \_\_\_\_\_

5. List All Additional Family Members in Student's Household (exclude student and parent[s]):

5a. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

5b. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

5c. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

5d. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

5e. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

5f. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Attending college YES NO

**SECTION 4 – FAMILY INFORMATION (INDEPENDENT STUDENT ONLY)**

- 1. Total # of Family Members: \_\_\_\_\_
- 2. Family Members Attending College: \_\_\_\_\_
- 3. Children NOT Attending College: \_\_\_\_\_
- 4. If the Student is Married, Enter Spouse's Information:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ SS #: \_\_\_\_\_

Attending College? Full Time  
Part Time  
Less than Part Time  
Not Attending

5. Does the Student Have Dependents Other Than a Spouse? YES NO

6. If Student Has Dependents (other than spouse), Please List:

6a. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: Son  
Daughter  
Other

Attending College: YES NO

6b. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: Son  
Daughter  
Other

Attending College: YES NO

6c. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: Son  
Daughter  
Other

Attending College: YES NO

6d. Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: Son  
Daughter  
Other

Attending College: YES NO

**SECTION 5 – NON-CUSTODIAL PARENT INFO (DEPENDENT STUDENT ONLY)**

1. Date of Divorce or Separation: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
2. Last Name: \_\_\_\_\_ 3. First Name: \_\_\_\_\_
4. Address: \_\_\_\_\_
5. City: \_\_\_\_\_ 6. State: \_\_\_\_\_ 7. Zip: \_\_\_\_\_
8. Phone: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_
9. Employer: \_\_\_\_\_
10. Who Last Claimed Student on Their Federal Income Tax Returns? \_\_\_\_\_
11. Year Claimed: \_\_\_\_\_
12. If Child Support is Applicable, Date Support Will End: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
13. Is There an Education Clause in the Divorce Decree? YES NO
14. If There an Education Clause, Enter Amount: \$ \_\_\_\_\_

**SECTION 6 – STUDENT INCOME**

1. Will the Student File a Federal Income Tax Return This Year? YES NO
2. If Filing, What Federal Tax Form? 1040 1040A  
1040 EZ Tele-File
3. If Filing Form is 1040, Is the Student Eligible to file a 1040A or 1040EZ?  
YES NO
4. Filing Status: SINGLE MARRIED  
HEAD OF HOUSE WIDOWER
5. Adjusted Gross Income (AGI): \$ \_\_\_\_\_  
(2007 Returns – Form 1040, line 37; Form 1040A, Line 21; Form 1040EZ line 4;  
Telefile, Line 1
6. Federal Income Taxes Paid: \$ \_\_\_\_\_  
(2007 Returns – Form 1040, Line 57; Form 1040A, Line 35, Form 1040EZ, line 11;  
Telefile, line K [2]
7. Federal Filing Exemptions (2007 IRS Form 1040 – line 6d  
Form 1040A –6d) \_\_\_\_\_
8. Earnings from Work: \$ \_\_\_\_\_  
(Refer to last year’s W2s – Box 1 + 8; or 2006 or 2005 Federal Tax Form 1040 – lines  
7 + 12 + 18; Tax form 1040A – line 7; Tax Form 1040EZ – line 1)
9. Spouse Earnings From Work (Independent Student ONLY) \$ \_\_\_\_\_  
(Refer to last year’s W2s – Box 1 + 8; or 2006 or 2005 Federal Tax Form 1040 – lines  
7 + 12 + 18; Tax form 1040A – line 7; Tax Form 1040EZ – line 1)
10. Itemized Deductions: \$ \_\_\_\_\_  
(2007 Returns – Form 1040, line 40;

11. Interest Income: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, Line 8a; Form 1040 A, Line 8a, Form 1040 EZ, line 2)
12. Dividend Income: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 9a; Form 1040, Line 9a)
13. Veterans' Educational Work-Study Allowances: \$ \_\_\_\_\_
14. Medical / Dental Expenses (Independent Student ONLY) \$ \_\_\_\_\_
15. (INDEPENDENT STUDENT ONLY)  
 This year, did / will anyone in your household receive benefits from any of the federal benefit programs listed below?
- 15a. Supplemental Security Income Program: YES NO
- 15b. Food Stamp Program: YES NO
- 15c. Free or Reduced School Lunch Program: YES NO
- 15d. Temporary Assistance for Needy Families: YES NO
- 15e. Special Supplemental Nutrition Program for Women, Infants, and Children: YES NO

## SECTION 7 – STUDENT WORKSHEET

1. Earned Income Credit: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 66a; 1040A – line 40a; 1040 EZ – line 8a; Telefile – line L[2])
2. Additional Child Tax Credit: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 68; 1040A – line 41)
3. Welfare Benefits \$ \_\_\_\_\_  
 (Include Temporary Assistance for Needy Families – TANF. Do NOT include food stamps or subsidized housing.)
4. Social Security Benefits Rcvd That Were NOT Taxed \$ \_\_\_\_\_
5. Payments to Tax-deferred Pension and Savings Plans: \$ \_\_\_\_\_  
 (Paid directly or withheld from earnings – including, but not limited to, 2007 W-2 Form, Boxes 12a – 12d, codes D, E, F, G, H, and S)
6. IRA Deductions and Payments to Self-Employed SEP, SIMPLE, Keogh, and Other Qualified Plans: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 28 + 32; 1040 A – line 17)
7. Child Support RECEIVED for All Children: \$ \_\_\_\_\_  
 (Do NOT Include Foster Care and/or Adoption Payments)
8. Tax Exempt Interest Income: \$ \_\_\_\_\_  
 (2007– Form 1040 – line 8b, or 1040A – line 8b)
9. Foreign Income Exclusions: \$ \_\_\_\_\_  
 (IRS Form 2555 – line 45, or 2555EZ – line 18)

10. **Untaxed Portions of IRA Distributions (EXCLUDE ROLLOVERS):** \$ \_\_\_\_\_  
(2007 – Form 1040 – lines 15a minus 15b; or  
2007 – Form 1040A – lines 11a minus 11b;  
If a Negative Number, Enter Zero)
11. **Untaxed Portions of Pensions (EXCLUDE ROLLOVERS):** \$ \_\_\_\_\_  
(2007 – Form 1040 – lines 16a minus 16b; or  
2007– Form 1040A – lines 12a minus 12b;  
If Negative Number, Enter Zero.)
12. **Credit for Federal Tax on Special Fuels (non-farmers ONLY):** \$ \_\_\_\_\_  
(2007– Form 4136 – line 20)
13. **Housing, Food, and Other Living Allowances Paid to Members of the Military, Clergy and Others:** \$ \_\_\_\_\_  
(Include Cash Payments and Cash Value of Benefits)
14. **Veterans' Non-education Benefits:** \$ \_\_\_\_\_  
(Disability, Death Pension, or Dependency Indemnity Compensation [DIC], and/or VA Educational Work-Study Allowances.)
15. **Any Other Untaxed Income or Benefits NOT Reported Elsewhere:** \$ \_\_\_\_\_  
(Worker's Compensation, Untaxed Portions or Railroad Retirement Benefits, Black Lung Benefits, Disability, etc. Do NOT include Student Aid, Workforce Investment Act Educational Benefits, or benefits from flexible spending arrangements.)
16. **Money Received, or Paid on Your Behalf, NOT Reported Elsewhere:** \$ \_\_\_\_\_
17. **Education Credits (Hope / Lifetime Learning Credits):** \$ \_\_\_\_\_  
(2007 Returns – Form 1040 – line 50, or 1040A – line 31
18. **Child Support PAID Because of Divorce / Separation** \$ \_\_\_\_\_
19. **Taxable Earnings from Federal Work-Study or Other Need-Based Work Programs:** \$ \_\_\_\_\_
20. **Student Grant, Scholarship, Fellowship, and Assistantship Aid, Including AmeriCorps Awards, THAT WERE REPORTED to the IRS in the Student's Adjusted Gross Income (AGI):** \$ \_\_\_\_\_

**SECTION 8 – STUDENT ASSETS**

**1. AS OF TODAY, Student’s Total Value of:**

- |                                    |                 |  |                 |
|------------------------------------|-----------------|--|-----------------|
| <b>a. Certificates of Deposit:</b> | <b>\$ _____</b> | <b>h. Other Securities:</b>                  | <b>\$ _____</b> |
| <b>b. T – Bills:</b>               | <b>\$ _____</b> | <b>i. Education IRAs:</b>                    | <b>\$ _____</b> |
| <b>c. Money Market Funds:</b>      | <b>\$ _____</b> | <b>j. College Savings Plans:</b>             | <b>\$ _____</b> |
| <b>d. Mutual Funds:</b>            | <b>\$ _____</b> | <b>k. Installment / Land Sale Contracts:</b> | <b>\$ _____</b> |
| <b>e. Stocks / Stock Options:</b>  | <b>\$ _____</b> | <b>l. Commodities:</b>                       | <b>\$ _____</b> |
| <b>f. Bonds:</b>                   | <b>\$ _____</b> |  |                 |
| <b>g. Trust Funds:</b>             | <b>\$ _____</b> | <b>Total Investments:</b>                    | <b>\$ _____</b> |

**2. AS OF TODAY, Student’s Total Current Balance of Cash, Savings, and Checking Accounts:** \$ \_\_\_\_\_

**3. AS OF TODAY, Student’s Total Current Value of IRA, Keogh, 401k, 403b, etc Accounts:** \$ \_\_\_\_\_

**4. AS OF TODAY, Student’s Total Current Value of Annuities:** \$ \_\_\_\_\_

**5. If a Trust Fund Has Been Established for the Student, Is Any Income or Part of the Principle Available?** YES NO NA

**6. If a Trust Fund Has Been Established for the Student, Who Established the Fund?**  
Parents  
Other  
NA

**7. Does the Student Own an INVESTMENT Farm?** YES NO

**8. If Yes, What is the Current Value?** \$ \_\_\_\_\_

**9. Does Student Own a Business?** YES NO

**10. If Yes, What is the Current Value?** \$ \_\_\_\_\_

**11. Does Student Receive Veteran’s Education Benefits?** YES NO

**11a. If Yes, for How Many Months, During the Calendar Year are Benefits Received?**  
\_\_\_\_\_

**Amount:** \$ \_\_\_\_\_

**SECTION 9 – STUDENT PROPERTY**

1. Does Student Own the Home in Which he/she Lives? **YES NO**

2. If Yes, Please Answer the Following:

2a. Monthly Home Mortgage: **\$ \_\_\_\_\_**  
(Include 1<sup>st</sup> and 2<sup>nd</sup> Mortgages [Principal, Interest, Taxes, and Insurance], Lines of Credit and Condo Fees)

2b. What is Your Home Worth Today? **\$ \_\_\_\_\_**

2c. What is Owed on Your Home? **\$ \_\_\_\_\_**  
(Include 1<sup>st</sup> and 2<sup>nd</sup> Mortgages and any Lines of Credit)

2d. Year Home Was Purchased: **\_\_\_\_\_**

2e. Cost of Home When Purchased: **\$ \_\_\_\_\_**

3. Does Student Own INVESTMENT Property? **YES NO**

3a. If YES, Please answer the Following:

	<b>PROP # 1</b>	<b>PROP # 2</b>	<b>PROP # 3</b>
3a1. Value:	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
3a2. Debt:	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>
3a3. Year Purchased:	<b>_____</b>	<b>_____</b>	<b>_____</b>
3a4. Purchase Price:	<b>\$ _____</b>	<b>\$ _____</b>	<b>\$ _____</b>

**SECTION 10 – PARENT INCOME (DEPENDENT STUDENT ONLY)**

1. Will Parent(s) File a Federal Income Tax Return This Year? **YES NO**

2. If Filing, What Federal Tax Form? **1040 1040A 1040EZ Tele-File**

3. If Filing 1040, Are the Parents Eligible to File a 1040 A or 1040 EZ? **YES NO**

(In general, you are eligible to file a 1040A or 1040EZ if you make less than \$100,000; do NOT itemize deductions; do NOT receive income from your own business or farm, do NOT receive self employment income, or alimony.)

4. Filing Status: **SINGLE MARRIED HEAD OF HOUSE WIDOWER**

5. Adjusted Gross Income (AGI): **\$ \_\_\_\_\_**  
(2007 Returns – Form 1040, line 37; Form 1040 A, Line 21; Form 1040 EZ, line 4; Tele-File, line 1

6. Federal Income Taxes Paid: **\$ \_\_\_\_\_**  
(2007 Returns – Form 1050, line 57; Form 1040A, Line 35, Form 1040EZ, line 11; Tele-File, line K [2]

7. Federal Filing Exemptions: **\_\_\_\_\_**  
(2007 IRS Form 1040 – line 6d; Form 1040 – 6d)

8. Father / Step Father Earnings from Work: \$ \_\_\_\_\_  
 (Refer to Last Year's W-2s – Box 1 + 8; or 2007 Federal Tax Form 1040 – lines 7 + 12 + 18; Tax Form 1040 A – line 7; Tax Form 1040EZ – line 1)
9. Mother / Step Mother Earnings from Work: \$ \_\_\_\_\_  
 (Refer to Last Year's W-2s – Box 1 + 8; or 2007 Federal Tax Form 1040 – lines 7 + 12 + 18; Tax Form 1040 A – line 7; Tax Form 1040EZ – line 1)
10. Itemized Deductions: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 40;
11. Income Adjustments: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 36; Form 1040A, Line 20
12. Interest Income: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 8a; Form 1040A, Line 8a, Form 1040EZ, line 2
13. Dividend Income: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 9a; Form 1040A, Line 9a
14. Net Income (or loss) from Business, Farm, Rents, Royalties, Partnerships, Estates, Trusts, etc.: \$ \_\_\_\_\_  
 (2007 Federal Tax Form 1040 – lines 12 +17 +18)
15. Other Taxable Income such as Alimony Received, Capital Gains (or losses), Pensions, Annuities, etc.: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, lines 10 + 11 + 13 + 15b + 16b + 19 + 20b + 21; Form 1040, lines 10 +11b + 12b + 13 + 14b; Form 1040EZ, line 3
16. Tuition and Fees Deductions: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040, line 33; Form 1040A, Line 18
17. Amounts Withheld from Wages for Dependent Care and Medical Spending Accounts: \$ \_\_\_\_\_
18. Medical / Dental Expenses NOT Covered by Insurance: \$ \_\_\_\_\_

## SECTION 11 – PARENT WORKSHEET (DEPENDENT STUDENT ONLY)

1. Earned Income Credit: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 66a; 1040A – line 40a; 1040EZ – line 8a; Telefile – line L [2]
2. Additional Child Tax Credit: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 68; 1040A – line 41
3. Welfare Benefits: \$ \_\_\_\_\_  
 (Include Temporary Assistance for Needy Families – TANF. Do NOT Include Food Stamps or Subsidized Housing.)
4. Social Security Benefits Rcvd that Were NOT Taxed (such as SSI): \$ \_\_\_\_\_
5. Payments to Tax-deferred Pension and Savings Plans: \$ \_\_\_\_\_  
 (Paid directly or withheld from earnings – including, But not limited to, 2007 W-2 Form, Boxes 12a – 12d, codes D, E, F, G, H, and S)
6. IRA Deductions and Payments to Self-Employed SEP, SIMPLE, Keogh, and Other Qualified Plans: \$ \_\_\_\_\_  
 (2007 Returns – Form 1040 – line 28 + 32; 1040 A – line 17

7. Child Support RECEIVED for All Children: \$ \_\_\_\_\_  
(Do NOT Include Foster Care and/or Adoption Payments)
8. Tax Exempt Interest Income: \$ \_\_\_\_\_  
(2007 – Form 1040 – line 8b, or 1040A – line 8b)
9. Foreign Income Exclusions: \$ \_\_\_\_\_  
(IRS Form 2555 – line 45, or 2555EZ – line 18)
10. Untaxed Portions of IRA Distributions (EXCLUDE ROLLOVERS): \$ \_\_\_\_\_  
(2007 – Form 1040 – lines 15a minus 15b; or  
2007 – Form 1040 A – lines 11a minus 11b;  
If a Negative Number, Enter Zero)
11. Untaxed Portions of Pensions (EXCLUDE ROLLOVERS): \$ \_\_\_\_\_  
(2007– Form 1040 – lines 16a minus 16b; or  
2007 – Form 1040A – lines 12a minus 12b;  
If Negative Number, Enter Zero.)
12. Credit for Federal Tax on Special Fuels (non-farmers ONLY): \$ \_\_\_\_\_  
(2007– Form 4136 – line 20)
13. Housing, Food, and Other Living Allowances Paid to Members of the Military, Clergy  
and Others: \$ \_\_\_\_\_  
(Include Cash Payments and Cash Value of Benefits)
14. Veterans' Non-education Benefits: \$ \_\_\_\_\_  
(Disability, Death Pension, or Dependency Indemnity Compensation [DIC], and/or  
VA Educational Work-Study Allowances.)
15. Any Other Untaxed Income or Benefits NOT Reported Elsewhere: \$ \_\_\_\_\_  
(Worker's Compensation, Untaxed Portions or Railroad Retirement Benefits, Black  
Lung Benefits, Disability, etc. Do NOT include Student Aid, Workforce Investment  
Act Educational Benefits, or benefits from flexible spending arrangements.)
16. Money Received, or Paid on Your Behalf, NOT Reported Elsewhere: \$ \_\_\_\_\_
17. Education Credits (Hope / Lifetime Learning Credits): \$ \_\_\_\_\_  
(2007 Returns – Form 1040 – line 50, or 1040A – line 31)
18. Child Support PAID Because of Divorce / Separation \$ \_\_\_\_\_
19. Taxable Earnings from Federal Work-Study or Other Need-Based Work Programs: \$ \_\_\_\_\_
20. Student Grant, Scholarship, Fellowship, and Assistantship Aid, Including AmeriCorps  
Awards, THAT WERE REPORTED to the IRS in the Student's Adjusted Gross  
Income (AGI): \$ \_\_\_\_\_

**SECTION 12 – PARENT ASSETS (Family Benefits)**

1. This year did / will anyone in your household receive benefits from any of the federal benefit programs listed below?

- |  |     |    |
|--|-----|----|
| 1a. Supplemental Security Income Program (SSI):                                    | YES | NO |
| 1b. Food Stamp Program:  | YES | NO |
| 1c. Free or Reduced Price School Lunch Program:                                    | YES | NO |
| 1d. Temporary Assistance for Needy Families:                                       | YES | NO |
| 1e. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC): | YES | NO |

2. 1. AS OF TODAY, Parents' Total Value of:

- |                             |          |                                       |          |
|-----------------------------|----------|---------------------------------------|----------|
| a. Certificates of Deposit: | \$ _____ | h. Other Securities:                  | \$ _____ |
| b. T – Bills:               | \$ _____ | i. Education IRAs:                    | \$ _____ |
| c. Money Market Funds:      | \$ _____ | j. College Savings Plans:             | \$ _____ |
| d. Mutual Funds:            | \$ _____ | k. Installment / Land Sale Contracts: | \$ _____ |
| e. Stocks / Stock Options:  | \$ _____ | l. Commodities:                       | \$ _____ |
| f. Bonds:                   | \$ _____ |                                       |          |
| g. Trust Funds:             | \$ _____ | Total Investments:                    | \$ _____ |

3. AS OF TODAY, Parent's Total Current Balance of Cash, Savings and Checking Accounts: \$ \_\_\_\_\_

4. AS OF TODAY, Parent's Total Current Value of IRA, Keogh, 401k, 403b, etc Accounts: \$ \_\_\_\_\_

5. AS OF TODAY, Parent's Total Current Value of Annuities: \$ \_\_\_\_\_

6. AS OF TODAY, Value of Parents' Assets Held in the Name of the Student's Brothers and Sisters under Age 19 and Not in College: \$ \_\_\_\_\_

7. AS OF TODAY, Value of Assets Held in Section 529 Prepaid Tuition Plans for the Student's Brothers and Sisters: \$ \_\_\_\_\_

8. AS OF TODAY, Value of Assets Held in Section 529 Prepaid Tuition Plans for the Student: \$ \_\_\_\_\_

9. Do the Parents Own an INVESTMENT FARM? \$ \_\_\_\_\_

9a. If Yes, What is the Current Value? \$ \_\_\_\_\_

10. Do the Parents Own a Business? YES NO

10a. If Yes, What is the Current Value? \$ \_\_\_\_\_

**SECTION 13 – PARENT(S) PROPERTY (DEPENDENT STUDENT ONLY)**

1. Monthly Home Mortgage / Rent Payment: \$ \_\_\_\_\_  
 (Include 1<sup>st</sup> and 2<sup>nd</sup> Mortgages [Principal, Interest, Taxes, and Insurance], Lines of Credit and Condo Fees)

2. What is Your Home Worth Today? \$ \_\_\_\_\_

3. What is Owed on Your Home? \$ \_\_\_\_\_  
 (Include 1<sup>st</sup> and 2<sup>nd</sup> Mortgages and any Lines of Credit)

4. Year Home Was Purchased: \_\_\_\_\_

5. Cost of Home When Purchased: \$ \_\_\_\_\_

9. Do the Parents Own INVESTMENT Property? YES NO

9a. If YES, Please answer the following:

	PROP # 1	PROP # 2	PROP # 3
9a1. Value:	\$ _____	\$ _____	\$ _____
9a2. Debt:	\$ _____	\$ _____	\$ _____
9a3. Year Purchased:	_____	_____	_____
9a4. Purchase Price:	\$ _____	\$ _____	\$ _____

**SECTION 14 – FAMILY LIFE INSURANCE / DEBT**

	Parent(s)	Student
1. Life Insurance Face Value (Total of all policies):	\$ _____	\$ _____
2. Life Insurance Cash Value (Total of all policies):	\$ _____	\$ _____
3. Life Insurance Annual Premium (Total of all policies):	\$ _____	\$ _____
4. Credit Card Debt:	\$ _____	\$ _____
5. Auto Debt:	\$ _____	\$ _____
6. Medical Debt:	\$ _____	\$ _____
7. Other Miscellaneous Debt (boat, furniture, etc.):	\$ _____	\$ _____

**SECTION 15 – COLLEGES STUDENT IS CURRENTLY CONSIDERING**

College or University	City, State	*Housing Code		
1. _____	_____	ON	OFF	P
2. _____	_____	ON	OFF	P
3. _____	_____	ON	OFF	P
4. _____	_____	ON	OFF	P
5. _____	_____	ON	OFF	P
6. _____	_____	ON	OFF	P

\*ON = Student Plans to Live ON Campus  
 OFF = Student Plans to Life OFF Campus  
 P = Student Plans to Live WITH PARENTS and/or RELATIVES

**SECTION 16 – SIGNATURES**

We have submitted this information for the purpose of analyzing our current financial situation as it pertains to our eligibility for college financial aid. Each item is accurate, true, and complete to the best of our knowledge and can be substantiated with IRS records and/or other similar documents. We understand that ALL information reported will be kept highly confidential and will NOT be released to any non-financial aid agency who is not directly affiliated with College Planning Group, Inc.

\_\_\_\_\_  
 Student's Signature

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Father's / Step Father's Signature  
 (if applicable)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Mother's / Step-Mother's Signature  
 (if applicable)

\_\_\_\_\_  
 Date