



STUDENT + PARENT INFORMATION

Enter Answers Below

Student first name (name as on Social Security card)

middle initial

last name

High school attending

Year in high school

Father / Stepfather first name

middle initial

last name

Mother / Stepmother first name

middle initial

last name

Student's permanent mailing address -- number / street / apt. number

City

State

Zip code

Student's permanent home telephone number

Student's permanent e-mail address

U.S. citizen (U), Eligible non-citizen (E), Neither (N)

Alien registration number

Student's date of birth

FAMILY INFORMATION

Family size--number in parents' household

Number of tax exemptions for parents' household

Number in college (excluding parents)

Student will be in college full time (F), 3/4 (T), 1/2 (H), less than 1/2 (L)

Student will live on campus (O), with parents (W), or off-campus (F)

Parent state of legal residence

Student's state of legal residence

Father / Stepfather date of birth

Mother / Stepmother date of birth

Other children and date of birth

**PARENT ASSETS**

Cash, checking and savings accounts

Stocks, bonds, mutual funds, investment value

Turst funds

529 plans

Residence value

Residence debt

Residence purchase price

Residence year of purchase

Monthly mortgage or rental payment

Other real estate value

Other real estate debt

Other real estate purchase price

Other real estate year of purchase

Retirement accounts (Mother)

Retirement accounts (Father)

W-2 wages earned (Mother)

W-2 wages earned (Father)

Self-employment income (Mother)

Self-employment income (Father)

Family owned and run business(es) value

Debt on family owned and run business (es)

**DEPENDENT STUDENT INFORMATION**

W-2 wages earned

Exemption claimed by student (S) or parent (P)

**Dependent Student Assets**

Cash, savings and checking accounts

Total value of IRA, Keogh, 401k, 403b, etc. accounts

Investments

UGMA/UTMA accounts