



College Planning Service America

Family Data Profile

(updated 07/04/2017)

STUDENT INFORMATION

Last Name _____

First Name _____

Middle Initial _____

Social Security Number _____ - _____ - _____

Date Of Birth ____/____/____

Male/Female M F

Home Address (Include Apt. #) _____

City _____

State _____

Zip Code _____

State Of Legal Residence _____

Were You A Legal Resident Before 01/01/2012? Yes No

When Did You Become A Legal Resident? Month _____ Year _____

Home Phone Number _____ - _____ - _____

Student Email Address _____

Student Marital Status _____

Student Driver's License Number _____ - _____ - _____

Student Driver's License State _____

US Citizen

Yes No

If Not, Alien Registration Number

A _____

Are You Registered With Selective Service?

Yes No (Register Me)

When You Begin College, What Will Your High School Completion Status Be?

High School Diploma

What Is The Name Of Your High School?

What City & State Is Your High School Located?

When You Begin This Coming School Year, What Will Be Your Grade Level?

Hs Sr Fr So Jr Sr

When You Begin This Coming School Year, What Degree Will You Be Working On?

1st Bachelor's 2nd Bachelor's
Master's Doctorate
Associate's Certificate

Are You Interested In Being Considered For Work Study?

Yes No

Will You Have Your First Bachelor's Degree Before 07/01/2016?

Yes No

Highest School Your Father Completed

Hs College Post Grad

Highest School Your Mother Completed

Hs College Post Grad

Drug Conviction Affecting Eligibility

Yes No

SCHOOL SELECTION SUMMARY

Name Of School

Location

Housing

(On/Off Campus, Commuter)

| | | |
|-------|-------|-------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

Notes Regarding College Choices:

PARENT INFORMATION

Current Marital Status

Single Married Divorced/Separated Widowed

Date Of Marriage

____/____/____

Date Of Divorce/Separation

____/____/____

Date Widowed

____/____/____

Father's Social Security Number

____-____-____

Mother's Social Security Number

____-____-____

Father's Last Name

Mother's Last Name

Father's First Name

Mother's First Name

Father's Middle Initial

Mother's Maiden Name

Father's Date Of Birth

____/____/____

Mother's Date Of Birth

____/____/____

Father's Driver's License Number

____-____-____

Mother's Driver's License Number

____-____-____

Father's Driver's License State

Mother's Driver's License State

Father's State Of Legal Residence

Mother's State Of Legal Residence

Did Father Become A Legal Resident Before
01/01/2012? Yes No

Did Mother Become A Legal Resident Before
01/01/2012? Yes No

When Did Father Become Legal Resident?

____/____

When Did Mother Become Legal Resident?

____/____

*Father's Email Address

*Mother's Email Address

* Check Box For Email To Be Used For All Official Correspondence

| Family Member | Relation To Student | Date of Birth | School | Year/Grade |
|---------------|---------------------|---------------|--------|------------|
| _____ | Self | X | _____ | _____ |
| _____ | Parent | X | _____ | _____ |
| _____ | Parent | X | _____ | _____ |
| _____ | Brother/Sister | _____ | _____ | _____ |
| _____ | Brother/Sister | _____ | _____ | _____ |
| _____ | Brother/Sister | _____ | _____ | _____ |

Total In Household: _____

Total In College: _____

PARENTS FINANCIAL INFORMATION

What Type Of Return Does Family File? 1040 1040a 1040ez

What Was Family's Adjusted Gross Income For 2017?
Line 37 (1040) / Line 21 (1040A) / Line 4 (1040EZ) \$ _____

How Much Did Father Earn From Working (Salary/Wages/Tips)?
(From W-2, 1099 Or Lines 7, 12, 18 From 1040) \$ _____

How Much Did Mother Earn From Working (Salary/Wages/Tips)?
(From W-2, 1099 Or Lines 7, 12, 18 From 1040) \$ _____

Is Either Parent Currently Unemployed (Dislocated Worker)? Yes No

Did The Family Receive Benefits From Any Of The Federal Programs Listed Below?

- Supplemental Security Income (SSI)
- Food Stamps Or SNAP
- Free Or Reduced Price Lunch
- Temporary Assistance For Needy Families
- WIC
- None Of The Above

If Family Filed A 1040 Federal Form, Were They Eligible To File A
1040a Or 1040ez? Yes No

Enter The Amount Of Federal Income Tax Paid (Line 56) \$ _____

Enter The Total Number Of Family Exemptions _____

ADDITIONAL PARENTAL FINANCIAL INFORMATION

Education Credits (American Opportunity, Hope, Lifetime Learning) (Line 50) \$ _____

Child Support Paid \$ _____

Taxable Earnings From Need-Based Employment Programs \$ _____

Student Grant & Scholarship Aid Reported In The Family AGI \$ _____

Combat Or Special Combat Pay \$ _____

Earnings From Work Under Co-Op Program Through College \$ _____

UNTAXED INCOME

Payments To Tax-Deferred Pension, And Savings Plans (W-2, Boxes 12a-12d-Codes D, E, F, G, H, S) \$ _____

IRA Deductions And Payments To Self-Employed SEP, Keogh (Lines 28 + 32) \$ _____

Child Support Received For All Children \$ _____

Tax Exempt Interest Income (Line 8b) \$ _____

Untaxed IRA Distributions (EXCLUDE ROLLOVERS)(Line 15a-15b) \$ _____

Untaxed Portion Of Pensions (EXCLUDE ROLLOVERS)(Line 16a-16b) \$ _____

Living Allowances Paid To Military Or Clergy Or Others \$ _____

Veteran's Non-Education Benefits (Disability, Death Pension) \$ _____

Other Untaxed Income (Workmen's Compensation, Disability) \$ _____

PARENTAL ASSESTS

| Financial Institution | Type Of Account | Account Value |
|------------------------------|---|----------------------|
| _____ | Checking | \$ _____ |
| _____ | Checking | \$ _____ |
| _____ | Savings | \$ _____ |
| _____ | Savings | \$ _____ |
| _____ | Money Market | \$ _____ |
| _____ | Mutual Funds | \$ _____ |
| _____ | Mutual Funds/Stocks | \$ _____ |
| _____ | Mutual Funds/Bonds | \$ _____ |
| _____ | 529/TAP | \$ _____ |
| _____ | Real Estate (Other Than Primary Residence) | \$ _____ |
| | TOTAL | \$ _____ |

STUDENT FINANCIAL INFORMATION

What Type Of Return Does Student File?

1040 1040a 1040ez Non-Filer

What Was Student's Adjusted Gross Income For 2017?

Line 37 (1040) / Line 21 (1040A) / Line 4 (1040EZ)

\$ _____

How Much Did Student Earn From Working (Salary/Wages/Tips)?

(From W-2)

\$ _____

Did The Student Receive Benefits From Any Of The Federal Programs Listed Below?

- Supplemental Security Income (SSI)
- Food Stamps Or SNAP
- Free Or Reduced Price Lunch
- Temporary Assistance For Needy Families
- WIC
- None Of The Above

If Family Filed A 1040 Federal Form, Were They Eligible To File A 1040a Or 1040ez?

Yes No

Enter The Amount Of Federal Income Tax Paid (Line 56)

\$ _____

Enter The Total Number Of Family Exemptions

STUDENT ASSETS

| Financial Institution | Type Of Account | Account Value |
|------------------------------|------------------------|----------------------|
| _____ | Checking | \$ _____ |
| _____ | Savings | \$ _____ |
| _____ | Money Market | \$ _____ |
| _____ | Mutual Funds | \$ _____ |
| _____ | Mutual Funds/UTMA | \$ _____ |
| | | \$ _____ |

ADDITIONAL INFORMATION

| | TOTAL |
|--|--|
| Father's Occupation _____ | Mother's Occupation _____ |
| Number Of Years _____ | Number Of Years _____ |
| Name of Employer _____ | Name of Employer _____ |
| Address Of Employer _____ _____ _____ | Address Of Employer _____ _____ _____ |
| Work Phone _____-_____-_____ | Work Phone _____-_____-_____ |
| Cell Phone _____-_____-_____ | Cell Phone _____-_____-_____ |

BUSINESS INFORMATION

Name Of Business _____

Business Address _____

City, State, Zip _____

Owner _____

Percentage Of Ownership _____ %

Date Business Started ____/____/____

Type Of Business S-Corp C-Corp LLC Sole Proprietor

Federal Tax Form Filed K-1 Schedule C

Approximate Value Of Business (Assets-Liabilities) \$ _____

REAL ESTATE

PRIMARY RESIDENCE

Year Purchased _____

Purchase Price \$ _____

Estimated Value \$ _____

FHIM Value \$ _____

Mortgage:

Lender _____

Term 10 15 20 30

Years Remaining _____

Balance \$ _____

Monthly Payment (Include Insurance & Taxes) \$ _____

If You Do Not Have A Mortgage On Primary Residence,
List The Amount Of Monthly Rent Paid \$ _____

OTHER REAL ESTATE

Year Purchased _____

Estimated Value \$_____

Mortgage:

Lender _____

Years Remaining _____

Monthly Payment (Include Insurance & Taxes)

Location _____

Purchase Price \$_____

FHIM Value \$_____

Term 10 15 20 30

Balance \$_____

\$_____

OTHER REAL ESTATE

Year Purchased _____

Estimated Value \$_____

Mortgage:

Lender _____

Years Remaining _____

Monthly Payment (Include Insurance & Taxes)

Location _____

Purchase Price \$_____

FHIM Value \$_____

Term 10 15 20 30

Balance \$_____

\$_____

INSURANCE & RETIREMENT

| Name Of Insured | Insurance Company | Type | Amount |
|-----------------|-------------------|---|----------|
| _____ | _____ | WL T UL <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | \$ _____ |
| _____ | _____ | WL T UL <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | \$ _____ |
| _____ | _____ | WL T UL <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | \$ _____ |
| _____ | _____ | WL T UL <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | \$ _____ |

| Owner | Location | Type | Amount |
|-------|----------|---|----------|
| _____ | _____ | WL T UL <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | \$ _____ |

Type
 IRA/SEP/403b
 401k-active/inactive
 Savings/Pension

| | | | |
|-------|-------|-------|----------|
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |
| _____ | _____ | _____ | \$ _____ |

Needs Analysis & Recommendations:
