



College Planning Service America, LLC

2021-2022

Family Information Update

Student's Full Name: _____

Attending Which College or University: _____

Check **Which Semesters** they will be attending the above school: *(check all appropriate boxes)*

Fall '21 _____ Winter '21 _____ Spring '22 _____ Summer '22 _____

21-22 Expected **Grade Level:** *(check one):* FR _____ SO _____ JR _____ SR _____ **GPA:** _____

Total expected **Credits** by start of Fall 2021 accumulated: _____ **Major:** _____

Student's Financial Information:

Checking/Savings: \$ _____ Investments: \$ _____ UTMA/UGMAs: \$ _____

Has the student filed **Federal 2020 Taxes:** Yes _____ No _____

- List all wages in 2020: (indicate N/A if applicable) \$ _____
- List all other 2020 income and its source: *(indicate N/A if applicable)*
- _____
- _____
- _____

Parent's Financial Information – Assets (Non-Retirement):

Checking/Savings: \$ _____ Money Market/CD's: \$ _____ Investments: \$ _____

529/TAP: \$ _____

Parent's Retirement Accounts: (e.g.: IRA, 401k, 403b, SEP, Annuity, Pension, etc.)

<u>Type of Account</u>	<u>In Who's Name</u>	<u>Current Value</u>
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Change in parent's **Marital Status:** Yes: _____ No: _____ If Yes, Please Indicate: _____

Date of current marital status (*marriage, separation, divorce, etc.*) _____

Indicate **Number of Family Members Living in Home For 21-22:** (include grandparents, college students, children and parents) _____

Indicate **Number of Family Members in College For 21-22:** (including parents if attending college) _____

Family Member Information: (list all members even if not in school)

<u>Name</u>	<u>School</u>	<u>20-21 Grade Level</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Primary Residence :

Mortgage: Yes _____ No: _____ **Rent:** Yes: _____ No: _____ **None:** _____ (explain below)

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Other Real Estate: *If None, Please Indicate: N/A* _____

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Type of Property (*vacation home – time-share - rental property – land – etc.*)

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

PLEASE LIST ADDITIONAL PROPERTIES ON A SEPARATE PIECE OF PAPER

Other Income:

Amount of **CHILD SUPPORT RECEIVED** for Student: \$ _____ (Annual)

Date support will end: _____ *If None, Please Indicate: N/A* _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT RECEIVED** for Siblings: \$ _____ (Annual)

Date support will end: _____ *If None, Please Indicate: N/A* _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT PAID** for Student: \$ _____ (Annual)

Date support will end: _____ *If None, Please Indicate: N/A* _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT PAID** for Siblings: \$ _____ (Annual)

Date support will end: _____ *If None, Please Indicate: N/A* _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **Social Security Benefits** Received: \$ _____ *If None, Please Indicate: N/A* _____

- By whom? _____
- Start date _____ End date _____

Amount of **Workers Compensation** Received: \$ _____ *If None, Please Indicate: N/A* _____

- By whom? _____
- Start date _____ End date _____

Amount in **Disability Payments** Received: \$ _____ *If None, Please Indicate: N/A* _____

- By whom? _____
- Start date _____ End date _____

Parental Employment Information:

Change in **Parent's Employment**: Yes: _____ No: _____

For Whom: Father: _____ Mother: _____

New Employer's Name & Address:

- Name: _____
- Street: _____
- City, State, Zip: _____

Reason for Change in Employment: _____

Was **Unemployment Compensation** Received? Yes: _____ No: _____

If Yes, By Whom: :

Start date: _____ End date: _____

Amount received \$ _____ Please Indicate: Monthly: _____ Biweekly: _____ Yearly: _____

Will there be a **Significant Increase or Decrease In 2020 Income?** Yes: _____ No: _____

If yes, indicate amount of difference: \$ _____ By whom:

Tuition Payments:

List all tuition payments for Elementary/Middle/High School being paid for 2020 school year:

<u>Student</u>	<u>School</u>	<u>Amount</u>
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Current Email Address:

(Emails are only used to setup online access to financial aid & CPSA Notices/Newsletters.)

Student's Email Address: _____

Mother's Email Address: _____

Father's Email Address: _____

Which Email to be used for all official correspondence? _____

Please Return to Our Office By: October 1, 2021

If there are any significant changes to your family's financial situation, please indicate on a separate piece of paper or contact us with further details at 610-726-1146. We look forward to working with you again this year.

Thank You!