



# College Planning Service America, LLC

## 201+ – 20% 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 '17 \_\_\_\_\_ Winter '17 \_\_\_\_\_ Spring '18 \_\_\_\_\_ Summer '18 \_\_\_\_\_

Indicate their **Enrollment Status** for EACH semester: (*F = Full Time, P = Part Time*)

Fall '17 \_\_\_\_\_ Winter '17 \_\_\_\_\_ Spring '18 \_\_\_\_\_ Summer '18 \_\_\_\_\_

Indicate their **Housing Status** for EACH semester: (*O = On Campus, F = Off Campus, C = Commuter*)

Fall '17 \_\_\_\_\_ Winter '17 \_\_\_\_\_ Spring '18 \_\_\_\_\_ Summer '18 \_\_\_\_\_

If student will attend Winter '17/Summer '18 or Study Abroad sessions (*specify which session*), please indicated where and how many credits:

• \_\_\_\_\_

17-18 Expected **Grade Level:** (*check one*) FR \_\_\_\_\_ SO \_\_\_\_\_ JR \_\_\_\_\_ SR \_\_\_\_\_ **GPA:** \_\_\_\_\_

Total expected **Credits** by start of Fall 2018 accumulated: \_\_\_\_\_ **Major:**  
\_\_\_\_\_

### Student's Financial Information:

Checking/Savings: \$ \_\_\_\_\_ Money Market/CD's: \$ \_\_\_\_\_ Mutual Funds: \$ \_\_\_\_\_

Stocks: \$ \_\_\_\_\_ Bonds: \$ \_\_\_\_\_ Trust Funds: \$ \_\_\_\_\_ UTMA/UGMAs: \$ \_\_\_\_\_

Has the student filed **Federal 2016 Taxes:** Yes \_\_\_\_\_ No \_\_\_\_\_

• List all wages in 2016: (indicate N/A if applicable) \$ \_\_\_\_\_

• List all other 2016 income and its source: (*indicate N/A if applicable*)

• \_\_\_\_\_

• \_\_\_\_\_

• \_\_\_\_\_

**Parent's Financial Information:**

Do you have any assets held with Allianz products that we service for you? Yes \_\_\_\_\_ No \_\_\_\_\_

**Assets (Non-Retirement):**

Checking/Savings: \$ \_\_\_\_\_ Money Market/CD's: \$ \_\_\_\_\_ Mutual Funds: \$ \_\_\_\_\_

Trust Funds: \$ \_\_\_\_\_ Stocks: \$ \_\_\_\_\_ Bonds: \$ \_\_\_\_\_ 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 17-18:** (include grandparents, college students, children and parents) \_\_\_\_\_

Indicate **Number Of Family Members In College For 17-18:** (including parents if attending college) \_\_\_\_\_

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

<u>Name</u>	<u>School</u>	<u>17-18 Grade Level</u>	<u>Cost</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

**Primary Residence:**

**Mortgage:** Yes \_\_\_\_\_ No: \_\_\_\_\_ **Rent:** Yes: \_\_\_\_\_ No: \_\_\_\_\_ **None:** \_\_\_\_\_ (explain below)

Outstanding Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Current Market Value: \$ \_\_\_\_\_ Year Purchased: \_\_\_\_\_

If New Home Indicate: Purchase Price: \$ \_\_\_\_\_ Total Number of Payments Left: \_\_\_\_\_

Explanation: \_\_\_\_\_

**Home Equity:**

*If None, Please Indicate: N/A* \_\_\_\_\_

Outstanding Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Available Balance: \$ \_\_\_\_\_ Total Number of Payments Left: \_\_\_\_\_

**Other Real Estate:**

*If None, Please Indicate: N/A* \_\_\_\_\_

Outstanding Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Current Market Value: \$ \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Year Purchased: \_\_\_\_\_ Total Number of Payments Left \_\_\_\_\_

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

\_\_\_\_\_

Outstanding Balance: \$ \_\_\_\_\_ Monthly Payment: \$ \_\_\_\_\_

Current Market Value: \$ \_\_\_\_\_ Purchase Price: \$ \_\_\_\_\_

Year Purchased: \_\_\_\_\_ Total Number of Payments Left \_\_\_\_\_

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

\_\_\_\_\_

**PLEASE LIST ADDITIONAL PROPERTIES ON A SEPARATE PIECE OF PAPER**

**Other Income:**

Amount of **CHILD SUPPORT RECEIVED** for Student: \$ \_\_\_\_\_

How is it paid: Weekly: \_\_\_\_\_ Biweekly: \_\_\_\_\_ Monthly: \_\_\_\_\_ Yearly: \_\_\_\_\_

Date support will end: \_\_\_\_\_ ***In None, Please Indicate: N/A*** \_\_\_\_\_

Is Support Court-Ordered? Yes: \_\_\_\_\_ No: \_\_\_\_\_

Amount of **CHILD SUPPORT RECEIVED** for Siblings: \$ \_\_\_\_\_

How is it paid: Weekly: \_\_\_\_\_ Biweekly: \_\_\_\_\_ Monthly: \_\_\_\_\_ Yearly: \_\_\_\_\_

Date support will end: \_\_\_\_\_ ***In None, Please Indicate: N/A*** \_\_\_\_\_

Is Support Court-Ordered? Yes: \_\_\_\_\_ No: \_\_\_\_\_

Amount of **CHILD SUPPORT PAID** for Student: \$ \_\_\_\_\_

How is it paid: Weekly: \_\_\_\_\_ Biweekly: \_\_\_\_\_ Monthly: \_\_\_\_\_ Yearly: \_\_\_\_\_

Date support will end: \_\_\_\_\_ ***In None, Please Indicate: N/A*** \_\_\_\_\_

Is Support Court-Ordered? Yes: \_\_\_\_\_ No: \_\_\_\_\_

Amount of **CHILD SUPPORT PAID** for Siblings: \$ \_\_\_\_\_

How is it paid: Weekly: \_\_\_\_\_ Biweekly: \_\_\_\_\_ Monthly: \_\_\_\_\_ Yearly: \_\_\_\_\_

Date support will end: \_\_\_\_\_ ***In 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: \_\_\_\_\_ *If None, Please Indicate: N/A* \_\_\_\_\_

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 None, Please Indicate: N/A* \_\_\_\_\_

If Yes, By Whom? \_\_\_\_\_

Start date: \_\_\_\_\_ End date: \_\_\_\_\_

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

Will there be a **Significant Increase Or Decrease In 2017 Income**? Yes: \_\_\_\_\_ No: \_\_\_\_\_

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

Has either parent **Filed For Bankruptcy** in the last 7 years? Yes: \_\_\_\_\_ No: \_\_\_\_\_

- Date of bankruptcy: \_\_\_\_\_
- Date of discharge: \_\_\_\_\_

Are there any ***Serious Credit Issues*** such as foreclosure, sheriff sale, lien, or delinquency on your credit report?

Yes: \_\_\_\_\_ No: \_\_\_\_\_ Identify issue: \_\_\_\_\_

**Tuition Payments:**

List all tuition payments for Elementary/Middle/High School being paid for 2016 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?

Father's: \_\_\_\_\_ Mother's: \_\_\_\_\_

**Please Return To Our Office By: October 1, 2017**

*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!*