



College Planning Service America, LLC

2018-2019

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 '18 _____ Winter '18 _____ Spring '19 _____ Summer '19 _____

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

Fall '18 _____ Winter '18 _____ Spring '19 _____ Summer '19 _____

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

Fall '18 _____ Winter '18 _____ Spring '19 _____ Summer '19 _____

If student will attend Winter '18/Summer '19 or Study Abroad sessions *(specify which session)*, please indicated where and how many credits: _____

17-19 Expected **Grade Level**: *(check one)*: FR _____ SO _____ JR _____ SR _____ **GPA**: _____

Total expected **Credits** by start of Fall 2019 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 2017 Taxes**: Yes _____ No _____

- List all wages in 2017: (indicate N/A if applicable) \$ _____

- List all other 2017 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 18-19**: (include grandparents, college students, children and parents) _____

Indicate **Number Of Family Members In College For 18-19**: (including parents if attending college) _____

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

<u>Name</u>	<u>School</u>	<u>18-19 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

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Other Income:

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

How is it paid: Weekly: _____ Biweekly: _____ Monthly: _____ Yearly: _____

Date support will end: _____ **If 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: _____ **If 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: _____ **If 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: _____ **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: _____ **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 2018 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 2018 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, 2018

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!

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