

## 2010 – 2011 Student Information Worksheet

This worksheet is for students who prefer to prepare their financial data on paper before entering the information in the Need Access Application at [www.needaccess.org](http://www.needaccess.org). Do not send your worksheet to Access Group.

Be sure to print the **Student Information Worksheet Instructions** that accompany this worksheet.

### Student's General Information

- |   |                                      |
|---|--------------------------------------|
| 1a. Name: _____                           | 1k. Social Security Number: _____    |
| 1d. Street: _____                         | 1m. Date of Birth: _____/_____/_____ |
| City/State/Zip: _____                     | 1n. State of Legal Residence: _____  |
| 1h. Country: _____                        |                                      |
| 1i. Phone Number: ( _____ ) _____ - _____ | 1j. E-mail Address: _____            |

*Please insert the appropriate codes to answer the questions below. (These codes are in the Student Information Worksheet Instructions.)*

- |   |  |
|---|--|
| 2a. Student's degree objective: _____                 | 2n. Will spouse be a student during the 2010-2011 academic year? _____       |
| 2b. Primary health care objective (Yes, No): _____    | 2o. Will student and spouse maintain separate households in 2010-2011? _____ |
| 2d. Year in graduate/professional school: _____       | 2p. Number of members in student's (and spouse's) household: _____           |
| 2f. U.S. citizenship status: _____                    | 2q. Number in student's household in college in 2010-2011: _____             |
| 2fa. Alien registration #/Visa status: _____          | 2r. Release of financial data to parents? _____                              |
| 2h. Last year student claimed by parent: _____        | 2t. Received need-based aid in 2009? _____                                   |
| 2k. Student's marital status: _____                   | 2z. Income from non-U.S. sources in 2009? _____                              |
| 2m. If married, marriage date: (Month/Day/Year) _____ |  |

### School Names

List below the names of the schools you wish to receive this information:

- |               |               |
|---------------|---------------|
| School: _____ | School: _____ |
| School: _____ | School: _____ |
| School: _____ | School: _____ |
| School: _____ | School: _____ |
| School: _____ | School: _____ |

## Student's (and Spouse's) Annual Income and Expense Figures

Please complete the table by entering the annual amounts in whole dollars only. Schools may require one or both years of income and expense data.

	2009	2010 (projected)
3,4a. Source of following U.S. Tax Figures:		
Completed 1040A or 1040EZ	Estimated 1040A or 1040EZ	Tax return will not be filed
Completed 1040	Estimated 1040	Completed 1040NR
Estimated 1040NR		
3,4b. Number of exemptions: _____		
3,4c. Adjusted gross income from IRS form:	\$ _____	\$ _____
3,4d. Itemized deductions (1040 Schedule A):	\$ _____	\$ _____
3,4e. U.S. income tax paid:	\$ _____	\$ _____
3,4f. Student's earned income from work:	\$ _____	\$ _____
3,4g. Spouse's earned income from work:	\$ _____	\$ _____
3,4h. Interest income:	\$ _____	\$ _____
3,4i. Dividend income:	\$ _____	\$ _____
3,4j. Other taxable income:	\$ _____	\$ _____
<b>Untaxed income and benefits</b>		
3,4k. Earned income credit:	\$ _____	\$ _____
3,4m. Social Security benefits:	\$ _____	\$ _____
3,4n. AFDC/TANF:	\$ _____	\$ _____
3,4o. Child support received:	\$ _____	\$ _____
3,4p. Other untaxed income/benefits:	\$ _____	\$ _____
3,4q. Medical/dental expenses:	\$ _____	\$ _____
3,4r. Elementary/junior high/high school tuition:	\$ _____	\$ _____
3,4s. Number of children's tuition paid for: _____		
<b>Income exclusions</b>		
3,4t. Child support paid by you:	\$ _____	\$ _____
3,4u. Education credits received:	\$ _____	\$ _____
3,4v. Financial aid reported as income:	\$ _____	\$ _____

## Student's (and Spouse's) Partial Year Income and Expense Figures

Please complete the table by entering the amounts in whole dollars only.

	3-Month Summer 2010	9-Month Academic Year 2010-2011
5a-b. Student's income from work:	\$ _____	\$ _____
5c-d. Spouse's income from work:	\$ _____	\$ _____
5e-f. Other taxable income:	\$ _____	\$ _____
5g-h. Untaxed income and benefits:	\$ _____	\$ _____
5i-j. Child care expenses:	\$ _____	\$ _____
5k. Unusual expenses (description): _____		
5m-n. Unusual expenses (amounts):	\$ _____	\$ _____
5o. Current rent/mortgage	\$ _____	
5p. Local taxes – 2009	\$ _____	
5q. Summer expenses – 2009	\$ _____	
5r. Summer expenses – 2010	\$ _____	

## Student's (and Spouse's) Household information

9c. Student/Spouse owns/leases a vehicle: (own, lease, own/lease, none) \_\_\_\_\_

9d-f. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_

9g-i. Year: \_\_\_\_\_ Make: \_\_\_\_\_ Model: \_\_\_\_\_

## Student's (and Spouse's) Assets

Please complete the table by entering the amounts in whole dollars only.

	Value	Debt
6a. Cash, savings, and checking accounts (today):	\$ _____	
6b-c. Home:	\$ _____	\$ _____
6d. If home is owned, year purchased:	_____	
6e. Home purchase price:	\$ _____	
6f-g. Other real estate:	\$ _____	\$ _____
6h-i. Business:	\$ _____	\$ _____
6ia. Small family-run business (Yes, No):	_____	
6j-k. Farm:	\$ _____	\$ _____
6m. Family lives on farm (Yes, No):	_____	
6n-o. Stocks, bonds, etc:	\$ _____	\$ _____
6p. Contingent trust funds:	\$ _____	
6q. Vested trust funds:	\$ _____	
6u. Retirement accounts:	\$ _____	
6x. Cash, savings, and checking accounts projected balance as of September 1, 2010:	\$ _____	

## Student's (and Spouse's) Indebtedness

Please complete the table by entering the amounts in whole dollars only.

	Owed as of 6/1/2010	To be repaid in 2010-2011
<b>Student's Education Loans</b>		
7a. Federal Loans:	\$ _____	
7b. Private/Alternative Loans:	\$ _____	
7c. Other Education Loans:	\$ _____	
7r-s. Spouse's Education Loans (Total all types):	\$ _____	\$ _____
<b>Student/Spouse's Non-education Debt</b>		
8a-b. Credit card debt:	\$ _____	\$ _____
8c-d. Auto loan debt:	\$ _____	\$ _____
8e-f. Other non-education debt:	\$ _____	\$ _____

## Student's (and Spouse's) Household Information

- 10h. School/college/educational institution in 2009-2010: \_\_\_\_\_
- 10i. Tuition, fees, room & board in 2009-2010: \$ \_\_\_\_\_
- 10j. Scholarships or gift aid in 2009-2010: \$ \_\_\_\_\_
- 10k. Loans and employment in 2009-2010: \$ \_\_\_\_\_
- 10m. Financial assistance received from parents last year: \$ \_\_\_\_\_

## Student's Other Household Members

- |                  | (11)<br>Member 1 | (12)<br>Member 2 | (13)<br>Member 3 | (14)<br>Member 4 |
|------------------|------------------|------------------|------------------|------------------|
| a. Name:         | _____            | _____            | _____            | _____            |
| b. Age:          | _____            | _____            | _____            | _____            |
| c. Relationship: | _____            | _____            | _____            | _____            |
|                  | (15)<br>Member 1 | (16)<br>Member 2 | (17)<br>Member 3 | (18)<br>Member 4 |
| a. Name:         | _____            | _____            | _____            | _____            |
| b. Age:          | _____            | _____            | _____            | _____            |
| c. Relationship: | _____            | _____            | _____            | _____            |
- Student's parent      Student's spouse      Student's grandparent  
 Student's brother/sister      Student's son/daughter      Other

## Student's (and Spouse's) Employment History

### (20) Student Employment

### (21) Spouse Employment

#### 3 Months, Summer 2010

- |                              |          |          |
|------------------------------|----------|----------|
| i. Employer:                 | _____    | _____    |
| j. Type of work:             | _____    | _____    |
| k. Number of weeks employed: | _____    | _____    |
| m. Weekly earnings:          | \$ _____ | \$ _____ |

#### 9 Months, Academic Year, 2010-2011

- |                              |          |          |
|------------------------------|----------|----------|
| n. Employer:                 | _____    | _____    |
| o. Type of work:             | _____    | _____    |
| p. Number of weeks employed: | _____    | _____    |
| q. Weekly earnings:          | \$ _____ | \$ _____ |

## Student Educational History

- 22a. Number of educational institutions attended (post high school): \_\_\_\_\_
- 22b. Institution 1 name: \_\_\_\_\_
- 22c. Dates of attendance: \_\_\_\_\_ 22d. Degree awarded: \_\_\_\_\_
- 22e. Institution 2 name: \_\_\_\_\_
- 22f. Dates of attendance: \_\_\_\_\_ 22g. Degree awarded: \_\_\_\_\_
- 22h. Institution 3 name: \_\_\_\_\_
- 22i. Dates of attendance: \_\_\_\_\_ 22j. Degree awarded: \_\_\_\_\_
- 22k. Institution 4 name: \_\_\_\_\_
- 22m. Dates of attendance: \_\_\_\_\_ 22n. Degree awarded: \_\_\_\_\_

## Student's Financial Aid History

- |                                  | Grants   | Loans    |
|----------------------------------|----------|----------|
| 23a-b. Undergraduate studies:    | \$ _____ | \$ _____ |
| 23c-d. Previous Graduate Degree: | \$ _____ | \$ _____ |
| 23e-f. Current Graduate Degree:  | \$ _____ | \$ _____ |
- 23p. Is the student in default on any student loans? (Yes, No): \_\_\_\_\_
- 23q. Explanation of default (if any): \_\_\_\_\_

## Spouse's Educational and Financial Aid History

- 24a. Spouse's name: \_\_\_\_\_ 24c. Spouse's age: \_\_\_\_\_
- If Spouse will be enrolled at least half time in 2010-2011:**
- 24d. What type of school (Undergraduate, Graduate/professional): \_\_\_\_\_
- 24e. At what educational institution: \_\_\_\_\_
- 24f. State location of institution: \_\_\_\_\_
- 24g. Estimated tuition for 2010-2011: \$ \_\_\_\_\_
- 24h. Spouse's year in school in 2010-2011 (1,2,3,4,5,6 or 7): \_\_\_\_\_
- 24i. Applied for financial aid for 2010-2011 (Yes, No): \_\_\_\_\_
- 24j. Status of grants for 2010-2011 (Granted, Pending, None): \_\_\_\_\_
- 24k. Amount of grants for 2010-2011: \$ \_\_\_\_\_
- 24m. Status of loans for 2010-2011 (Granted, Pending, None): \_\_\_\_\_
- 24n. Amount of loans for 2010-2011: \$ \_\_\_\_\_
- 24o. Last degree awarded to spouse: \_\_\_\_\_
- 24p. Dates attended for last degree: \_\_\_\_\_
- 24q. Major field of spouse's last degree: \_\_\_\_\_

**Student's (and Spouse's) Other Resources**

- 25a. Student's (and Spouse's) other scholarships/grants: \$ \_\_\_\_\_
- 25b. Financial assistance from parents for 2009-2010 year: \$ \_\_\_\_\_
- 25bt. Type of assistance (Gift, Loan): \_\_\_\_\_
- 25c. Financial assistance from parents for 2010-2011 year: \$ \_\_\_\_\_
- 25ct. Type of assistance (Gift, Loan): \_\_\_\_\_
- 25d. Other financial assistance for 2009-2010 year: \$ \_\_\_\_\_
- 25dd. Source of assistance: \_\_\_\_\_
- 25dt. Type of assistance (Gift, Loan): \_\_\_\_\_
- 25e. Other financial assistance for 2010-2011 year: \$ \_\_\_\_\_
- 25ed. Source of assistance: \_\_\_\_\_
- 25et. Type of assistance (Gift, Loan): \_\_\_\_\_

**Prospective Spouse's Financial information**

- 26a. Income from work, Summer 2010: \$ \_\_\_\_\_
- 26b. Income from work, academic year 2010-2011: \$ \_\_\_\_\_
- 26c. Home value: \$ \_\_\_\_\_
- 26d. Home debt: \$ \_\_\_\_\_
- 26e. If home is owned, year purchased: \$ \_\_\_\_\_
- 26f. Purchase price: \$ \_\_\_\_\_
- 26g. Retirement account value: \$ \_\_\_\_\_
- 26j. Cash, savings, and checking accounts projected balance as of September 1, 2010: \$ \_\_\_\_\_

**Student's Special Circumstances**

29. Please describe your special circumstances below. \_\_\_\_\_

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