



This document is for those students who wish to prepare their financial data on paper before entering it onto the Need Access Web Application. The first part of the worksheet provides data item captions and space to fill in your answers for those items. The second part of the worksheet contains detailed instructions for completing each data item. (These are the same instructions presented during direct keying of the data onto the Need Access Web Application.) Do not return this worksheet to Need Access.

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: _____	1o. FAFSA Filing Date: ____ / ____ / ____
1i. Phone Number: (____) _____ - _____	1j. E-mail Address: _____

Please insert the appropriate codes to answer the questions below. See instructions for the codes:

2a. Student's degree objective: _____ (See Instructions for Codes)	2k. Student's marital status: _____
2b. Primary care objective: _____ (if answered "5" in 2a)	2m. If married, marriage date: (Month/Day/Year) _____
2c. Completion of degree requirements: _____	2n. Will spouse be a student during the 2007-2008 academic year? _____
2d. Year in graduate/professional school: _____	2o. Will student and spouse maintain separate households in 2007-2008? _____
2e. Expected Enrollment Status: _____	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 2007-2008? _____
2fa. Alien Registration #/Visa Status: _____	2r. Student's course of study in 2007-2008: _____ (See instructions for codes.)
2g. Financial Aid Desired from _____ to _____ mm/yyyy mm/yyyy	2s. Student's housing plans for 2007-2008: _____ (1=On campus, 2=Off campus, 3=With parents, 4=With other relatives)
2h. Student claimed by parents as exemption: (1=Yes, 2=No) in 2005? _____	
2i. in 2006? _____	
2j. in 2007? _____	

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.

	2006	2007
3, 4a. Source of Following U.S. Tax Figures:	_____	_____
1 = Completed 1040A or 1040EZ		
2 = Completed 1040		
3 = Estimated 1040A or 1040EZ		
4 = Estimated 1040		
5 = Tax return will not be filed		
6 = Completed 1040NR		
7 = 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:	\$ _____	\$ _____
Untaxed income and benefits		
3, 4k. Earned income credit:	\$ _____	\$ _____
3, 4m. Social security benefits:	\$ _____	\$ _____
3, 4n. AFDC:	\$ _____	\$ _____
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:	_____	_____
Income exclusions		
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 annual amounts in whole dollars only.

	3 Month Summer 2007	9 Month Academic Year 2007-2008
5a-b. Student's income from work:	\$ _____	\$ _____
5c-d. Spouse's income from work:	\$ _____	\$ _____
5e-f. Other taxable income:	\$ _____	\$ _____
5g-h. Untaxable income and benefits:	\$ _____	\$ _____
5i-j. Child care expenses:	\$ _____	\$ _____
5k. Unusual expenses (description):	_____	_____
5m-n. Unusual expenses (amounts):	\$ _____	\$ _____

Student's (and Spouse's) Assets

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

	Value	Debt
6a. Cash, savings, and checking accounts:	\$ _____	\$ _____
6b-c. Home:	\$ _____	\$ _____
6d. If home is owned, year purchased: _____		
6e. and purchased price: \$ _____		
6f-g. Other real estate:	\$ _____	\$ _____
6h-i. Business:	\$ _____	\$ _____
6j-k. Farm:	\$ _____	\$ _____
6m. Family lives on farm: (1 = Yes, 2 = No) _____		
6n-o. Stocks, bonds, etc:	\$ _____	\$ _____
6p. Contingent trust funds:	\$ _____	\$ _____
6q. Vested trust funds:	\$ _____	\$ _____
6r. Description of other assets: _____		
6s-t. Amounts of other assets:	\$ _____	\$ _____
6u. Individual retirement account (IRA):	\$ _____	\$ _____
6v. Keogh retirement account:	\$ _____	\$ _____
6w. Other retirement accounts:	\$ _____	\$ _____
6x. Cash, savings, and checking accounts projected balance as of September 1, 2007:	\$ _____	\$ _____

Student's (and Spouse's) Indebtedness

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

	Owed as of 6/1/2007	To be repaid in 2007/2008
Student's educational loans:		
7a-b. Federal Perkins Loans:	\$ _____	\$ _____
7c. Total Perkins Loans ever borrowed: \$ _____		
7d-e. Federal Stafford Loans:	\$ _____	\$ _____
7f-g. Federal Supplemental Loans:	\$ _____	\$ _____
7h-l. HPSL or PCL Loans:	\$ _____	\$ _____
7j-k. HEAL Loans:	\$ _____	\$ _____
7m-n. Federal Consolidation Loans:	\$ _____	\$ _____
7o-p. Other Educational Loans:	\$ _____	\$ _____
7q. Description: _____		
7r-s. Spouse's Educational Loans (Total all types):	\$ _____	\$ _____
Student/Spouse's Noneducational Debt		
8a-c. Lender: _____ Amounts:	\$ _____	\$ _____
8d. Loan Purpose: _____		
8e-g. Lender: _____ Amounts:	\$ _____	\$ _____
8h. Loan Purpose: _____		
8i-k. Lender: _____ Amounts:	\$ _____	\$ _____
8m. Loan Purpose: _____		
8n-p. Lender: _____ Amounts:	\$ _____	\$ _____
8q. Loan Purpose: _____		

Student's (and Spouse's) Household Expenses

- 9a. Monthly rent/mortgage amount: \$ _____
- 9b. Local income and property taxes: \$ _____
- 9c. Student/Spouse owns/leases a vehicle: (1=own, 2=lease, 3=own/lease, 4=none) _____
- 9d-f. Year: _____ Make: _____ Model: _____
- 9g-i. Year: _____ Make: _____ Model: _____
- 9j. Total vehicle indebtedness as of December 31, 2006: \$ _____
- 9k. Total monthly vehicle payments: \$ _____

Student's (and Spouse's) Summer Expenses

Enter annual amounts, whole dollars only.

- | | | |
|-------------------------------------------------|-------|-------|
| | 2006 | 2007 |
| 9m-n. Student's (and Spouse's) summer expenses: | _____ | _____ |

Student's (and Spouse's) Household information

Student Applicant information

- 10h. Present school/college/educational institution: _____
- 10i. Tuition, fees, room & board in 2006-2007: \$ _____
- 10j. Scholarships or gift aid in 2006-2007: \$ _____
- 10k. Loans and employment in 2006-2007: \$ _____
- 10m. Financial assistance received from parents last year: \$ _____

Student's Other Household Members

	(11) Member 1	(12) Member 2	(13) Member 3	(14) Member 4
a. Name:	_____	_____	_____	_____
b. Age	_____	_____	_____	_____
c. Relationship:	_____	_____	_____	_____
1=Student's parent	2=Student's brother/sister			
3=Student's spouse	4=Student's son/daughter			
5=Student's grandparent	6=Other			

2007-2008 Academic Year

- | | | | | |
|------------------------------------|-------|-------|-------|-------|
| d. College student?: (1=Yes, 2=No) | _____ | _____ | _____ | _____ |
| e. Institution Name: | _____ | _____ | _____ | _____ |
| f. Class in school: | _____ | _____ | _____ | _____ |
| g. Aid from parents?: | _____ | _____ | _____ | _____ |

2006-2007 Academic Year

- | | | | | |
|--------------------------------|-------|-------|-------|-------|
| h. Institution name: | _____ | _____ | _____ | _____ |
| i. Tuition, fees, etc: | _____ | _____ | _____ | _____ |
| j. Scholarships, etc: | _____ | _____ | _____ | _____ |
| k. Loans, employment: | _____ | _____ | _____ | _____ |
| m. Aid from parents last year: | _____ | _____ | _____ | _____ |

Student's Other Household Members (continued)

(15)
Member 1

(16)
Member 2

(17)
Member 3

(18)
Member 4

- a. Name: _____
- b. Age _____
- c. Relationship: _____
- 1=Student's parent 2=Student's brother/sister
3=Student's spouse 4=Student's son/daughter
5=Student's grandparent 6=Other

2007-2008 Academic Year

- d. College student?: (1=Yes, 2=No) _____
- e. Institution Name: _____
- f. Class in school: _____
- g. Aid from parents?: _____

2006-2007 Academic Year

- h. Institution Name: _____
- i. Tuition, fees, etc: _____
- j. Scholarships, etc: _____
- k. Loans, employment: _____
- m. Aid from parents last year: _____

Student's (and Spouse's) Employment History

(20)
Student Employment

(21)
Spouse Employment

3 Months, Summer 2006

- a. Employer: _____
- b. Type of work: _____
- c. Number of week employed: _____
- d. Weekly earnings: _____

9 Months, Academic Year, 2006-2007

- e. Employer: _____
- f. Type of work: _____
- g. Number of week employed: _____
- h. Weekly earnings: _____

3 Months, Summer 2007

- i. Employer: _____
- j. Type of work: _____
- k. Number of week employed: _____
- m. Weekly earnings: _____

9 Months, Academic Year 2007-2008

- n. Employer: _____
- o. Type of work: _____
- p. Number of week employed: _____
- q. Weekly earnings: _____

Student's 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: _____
- 22o. Institution 5 name: _____
- 22p. Dates of attendance: _____ 22q. Degree awarded: _____
- 22r. Institution 6 name: _____
- 22s. Dates of attendance: _____ 22t. Degree awarded: _____
- 22u. Institution 7 name: _____
- 22v. Dates of attendance: _____ 22w. Degree awarded: _____
- 22x. Institution 8 name: _____
- 22y. Dates of attendance: _____ 22z. Degree awarded: _____

Student's Financial Aid History

- | | Grants | Loans |
|---------------------------------------------------------------------|--------|-------|
| 23a-b. Undergraduate studies: | _____ | _____ |
| 23c-d. Previous Graduate Degree: | _____ | _____ |
| Graduate Financial Aid | | |
| 23e-f. First Year: | _____ | _____ |
| 23g-h. Second Year: | _____ | _____ |
| 23i-j. Third year: | _____ | _____ |
| 23k-m. Fourth Year: | _____ | _____ |
| 23n-o. Fifth Year (and later years): | _____ | _____ |
| 23p. Is the student in default on any student loans? (1=Yes, 2=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 2007-2008:**
- 24d. What type of school (1=Undergraduate, 2=Graduate/professional): _____
- 24e. At what educational institution: _____ 24f. State location of institution: _____
- 24g. Estimated tuition for 2007-2008: _____
- 24h. Spouse's year in school in 2007-2008 (1,2,3,4,5,6 or 7): _____
- 24i. Applied for financial aid for 2007-2008 (1=Yes, 2=No): _____
- 24j. Status of grants for 2007-2008 (1=Granted, 2=Pending, 3=None): _____ 24k. Amount of grants for 2007-2008: _____
- 24m. Status of loans for 2007-2008 (1=Granted, 2=Pending, 3=None): _____ 24n. Amount of loans for 2007-2008: _____
- 24o. Last degree awarded to spouse: _____
- 24p. Dates attended for last degree: _____
- 24 q. 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 2006-2007 year: \$ _____
- 25bt. Type of assistance (1=Gift, 2=Loan): _____
- 25c. Financial assistance from parents for 2007-2008 year: \$ _____
- 25ct. Type of assistance (1=Gift, 2=Loan): _____
- 25d. Other financial assistance for 2006-2007 year: \$ _____
- 25dd. Source of assistance: _____
- 25dt. Type of assistance (1=Gift, 2=Loan): _____
- 25e. Other financial assistance for 2007-2008 year: \$ _____
- 25ed. Source of assistance: _____
- 25et. Type of assistance (1=Gift, 2=Loan): _____

Prospective Spouse's Financial information

- 26a. Income from work, Summer 2007: _____
- 26b. Income from work, academic year 2007-2008: _____
- 26c. Home value: _____
- 26d. Home debt: _____
- 26e. If home is owned, purchased: _____
- 26f. Purchase price: _____
- 26g. Individual Retirement Account (IRA): _____
- 26h. Keogh Retirement Account(s): _____
- 26i. Other Retirement Account(s): _____
- 26j. Cash, Savings, and Checking Accounts - Projected balance as of September 1, 2007: _____

