

## **College Planning Service America**

### **Family Data Profile**

(Updated /1 /202 )

### **STUDENT INFORMATION**

Last Name	
First Name	
Middle Initial	
Social Security	
Date of Birth	
Male/Female/Non-binary	M  F  N
Home Address (Include Apt. #)	
City	
State	
Zip Code	<del></del>
State of Legal Residence	
When Did You Become A Legal Resident?	Month Year
Student Cell Phone Number	
Student Email Address	
Student Marital Status	
Student Driver's License Number	
Student Driver's License State	
US Citizen	Yes □ No □
If Not, Alien Registration Number	A

When You Begin College, What Will Your High School Completion Status Be?	High School Diploma $\square$
What Is the Name of Your High School?	
What City & State Is Your High School Located?	
When You Begin This Coming School Year, What Will Be Your Grade Level?	Hs Sr □ Fr □ So □ Jr □ Sr □
What Degree Will You Be Working On?	1 <sup>st</sup> Bachelor's ☐ 2 <sup>nd</sup> Bachelor's ☐ Master's ☐ Doctorate ☐ Associate's ☐ Certificate ☐
Will You Have Your First Bachelor's Degree Before 07/01/2024?	Yes □ No □
Highest School Your Parent 1 Completed	Hs ☐ College ☐ Post Grad ☐
Highest School Your Parent 2 Completed	Hs ☐ College ☐ Post Grad ☐

### **SCHOOL SELECTION SUMMARY**

	Name of School		Location		Housing (On/Off Campus, Commuter)
_		-		-	
_		-		-	
_		-		-	
_		-		-	
_		-		-	
_		-		-	
_		-		-	
_		_		-	
_		_		_	
Note	es Regarding College Choices:				

### **PARENT INFORMATION**

Current Marital Status	Single $\square$ Married $\square$ Divorced/Separated $\square$ Widowed $\square$
Date of Marriage	/
Date of Divorce/Separation	
Date Widowed	
Parent 1: Social Security Number	Parent 2: Social Security Number
Parent 1: Last Name	Parent 2: Last Name
Parent 1: First Name	Parent 2: First Name
Parent 1: Middle Initial	Parent 2: Maiden Name
Parent 1: Date of Birth	Parent 2: Date of Birth/
Parent 1: Driver's License Number	Parent 2: Driver's License Number
Parent 1: Driver's License State	Parent 2: Driver's License State
Parent 1: State of Legal Residence	Parent 2: State of Legal Residence
When Did Parent 1 Become Legal Resid/ month/year	lent? When Did Parent 2 Become Legal Resident?/ month/year
Parent 1: Email Address	Parent 2: Email Address
Parent 1: Cell Phone number	Parent 2: Cell Phone number

Family Member	Relation to Student	Date of Birth	School	Year/Grade
	Self	Х		
	Parent	Х		
	Parent	X		
	Brother/Sister			
	Brother/Sister			
	Brother/Sister			
Total in Household	l:		Total in College:	

### **PARENTS FINANCIAL INFORMATION**

What Type of Return Does Family File?	1040 🗆
What Was Family's Adjusted Gross Income For 2023? (Line 11 1040)	\$
How Much Did Parent 1 Earn from Working (Salary/Wages/Tips)? (From W-2, 1099 Or Schedule 1)	\$
How Much Did Parent 2 Earn from Working (Salary/Wages/Tips)? (From W-2, 1099 Or Schedule 1)	\$
Is Either Parent Currently Unemployed (Dislocated Worker)?	Yes □ No □
Did the Family Receive Benefits from Any of The Federal Programs Listed Below?	
☐ Supplemental Security Income (SSI)	
☐ Food Stamps Or SNAP	
☐ Free or Reduced Price Lunch	
☐ Temporary Assistance for Needy Families	
□ WIC	
$\square$ None of The Above	
Enter the Amount of Federal Income Tax Paid (Line 22)	\$
Enter the Total Number of Family Exemptions	

### **UNTAXED INCOME**

Payments to Tax-Deferred Pension, And Savings Plans (W-2 Boxes 12a-12d-Codes D, E, F, G, H, S)	\$
IRA Deductions and Payments to Self-Employed SEP, Keogh	\$
Child Support Received for All Children	\$
Tax Exempt Interest Income (Line 2a)	\$
Untaxed IRA Distributions and/or Untaxed Portion of Pensions (EXCLUDE ROLLOVERS) (Line 4a-4b)	\$
Living Allowance Paid to Military or Clergy or Others	\$
Vetreran's Non-Education Benefits (Disability, Death Pension)	\$
Other Untaxed Income (Workmen's Compensation, Disability)	\$

### **PARENTAL ASSESTS**

Financial Insititution	Type of Account	Account Value
	Checking	
	_ Checking	
	_ Savings	
	_ Savings	
	_ Money Market	
	_ Mutual Funds	
	Mutual Funds/Stocks	
	_ Mutual Funds/Stocks	
	_ 529/TAP	
	Real Estate (Other Than Primary Residence)	
		TOTAL \$

### **STUDENT FINANCIAL INFORMATION**

What Type of Return Does Student Fil	e?	1040 $\square$ Non-Filer $\square$		
What Was Student's Adjusted Gross Ir (Line 11 1040)	\$			
How Much Did Student Earn from Wo (From W-2, 1099 or Schedule 1)	rking (Salary/Wages/Tips)?	\$		
Did the Student Receive Benefits from	Any of the Federal Programs List	ed Below?		
☐ Supplemental Security Income (SSI	)			
$\square$ Food Stamps or SNAP				
☐ Free rr Reduced Price Lunch				
☐ Temporary Assistance for Needy Fa	amilies			
□ wic				
□ None of the Above				
Enter the Amount of Federal Income 1 (Line 22)	Гах Paid	\$		
STUDENT ASSETS				
Financial Insititution	Type of Account	Account Value		
	Checking			
	Savings			
	Money Market			
	Mutual Funds			
	Mutual Funds/UTMA			

TOTAL \$\_\_\_\_\_

### **ADDITIONAL INFORMATION**

PARENT 1	PARENT 2
Occupation	Occupation
Number of Years	Number of Years
Name of Employer	Name of Employer
Address of Employer	Address of Employer
BUSINESS INFORMATION	
Name of Business	
Business Address	
City, State, Zip	
Owner	
Percentage of Ownership	%
Date Business Started	
Type of Business	S-Corp $\square$ C-Corp $\square$ LLC $\square$ Sole Proprietor $\square$
Federal Tax Form Filed	K-1 $\square$ Schedule C $\square$
Approximate Value of Business (Assets-Liabilities)	\$

#### **REAL ESTATE**

# PRIMARY RESIDENCE Year Purchased Purchase Price \$\_\_\_\_\_ Estimated Value \$\_\_\_\_\_ <u>Mortgage</u> Monthly Payment (Include Insurance & Taxes) \$\_\_\_\_\_ Balance \$ If You Do Not Have a Motgage On Primary Residence, List the Amount of Monthly Rent \$\_\_\_\_\_ Paid Address (Include city, state & zip) OTHER REAL ESTATE Purchase Price \$\_\_\_\_\_ Estimated Value \$\_\_\_\_\_ Year Purchased Mortgage Monthly Payment (Include Insurance & Taxes) \$\_\_\_\_\_ Balance \$\_\_\_\_\_ If You Do Not Have a Motgage On Primary Residence, List the Amount of Monthly Rent \$ Paid Address (Include city, state & zip) OTHER REAL ESTATE

Year Purchased	Purchase Price	\$	Estimated Value	\$
<u>Mortgage</u>				
Lender				
Monthly Payment (Include Insurance & T	Taxes)	\$	Balance	\$
If You Do Not Have a Motgage On Prima	ry Residence, L	ist the Amount of I	Monthly Rent	\$

### **RETIREMENT**

Owner	Location	Type IRA/SEP/403b 401k-active/inactive Savings/Pension	Amount	
			\$	
·			\$	
			\$	
			\$	