

## Parent Financial Statement

This information will be used to calculate an Expected Family Contribution that will be compared to college costs to determine possible aid eligibility. Your answers will be used only for this purpose and the information will not be saved.

Note:    1. If the parents are divorced or separated, call me before filling out this form.  
          2. If the student is not an unmarried dependent of the parent(s), call me before filling out this form.  
          3. If you do not have a value for an item, enter 0.

State of residence: \_\_\_\_\_

Age of older parent: \_\_\_\_\_

Number of family members in the household: \_\_\_\_\_

Number of children in college when the student will be a freshman: \_\_\_\_\_

For the year \_\_\_\_\_, what is

Father's taxable income (AGI) \_\_\_\_\_

Mother's taxable income (AGI) \_\_\_\_\_

Federal income tax paid \_\_\_\_\_

Parents untaxed income \_\_\_\_\_

Student income \_\_\_\_\_

As of today, what is

Value of parent's savings and investments (Including real estate other than the family home, but not retirement funds)  
\_\_\_\_\_

Value of the family residence (Home market value less mortgage) \_\_\_\_\_

Value of student savings and investments \_\_\_\_\_

*PLEASE NOTE: I would like to have this financial statement, along with the completed parent and student questionnaires, at least one day prior to your appointment. Copies may be e-mailed, faxed or mailed to me.*

