

2009 – 2010 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. 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 2009-2010 academic year? _____ |
| 2b. Primary health care objective (Yes, No): _____ | 2o. Will student and spouse maintain separate households in 2009-2010? _____ |
| 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 2009-2010: _____ |
| 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 2008? _____ |
| 2k. Student's marital status: _____ | 2z. Income from non-U.S. sources in 2008? _____ |
| 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.

	2008	2009 (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:	\$ _____	\$ _____
Untaxed income and benefits		
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:	_____	_____
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 amounts in whole dollars only.

	3-Month Summer 2009	9-Month Academic Year 2009-2010
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 – 2008	\$ _____	
5q. Summer expenses – 2008	\$ _____	
5r. Summer expenses – 2009	\$ _____	

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, 2009:	\$ _____	

Student's (and Spouse's) Indebtedness

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

	Owed as of 6/1/2009	To be repaid in 2009-2010
Student's Education Loans		
7a. Federal Loans:	\$ _____	
7b. Private/Alternative Loans:	\$ _____	
7c. Other Education Loans:	\$ _____	
7r-s. Spouse's Education Loans (Total all types):	\$ _____	\$ _____
Student/Spouse's Non-education Debt		
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 2008-2009: _____
- 10i. Tuition, fees, room & board in 2008-2009: \$ _____
- 10j. Scholarships or gift aid in 2008-2009: \$ _____
- 10k. Loans and employment in 2008-2009: \$ _____
- 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: | _____ | _____ | _____ | _____ |
| | (15)
Member 1 | (16)
Member 2 | (17)
Member 3 | (18)
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 2009

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

9 Months, Academic Year, 2009-2010

- | | | |
|------------------------------|----------|----------|
| 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 2009-2010:**
- 24d. What type of school (Undergraduate, Graduate/professional): _____
- 24e. At what educational institution: _____
- 24f. State location of institution: _____
- 24g. Estimated tuition for 2009-2010: \$ _____
- 24h. Spouse's year in school in 2009-2010 (1,2,3,4,5,6 or 7): _____
- 24i. Applied for financial aid for 2009-2010 (Yes, No): _____
- 24j. Status of grants for 2009-2010 (Granted, Pending, None): _____
- 24k. Amount of grants for 2009-2010: \$ _____
- 24m. Status of loans for 2009-2010 (Granted, Pending, None): _____
- 24n. Amount of loans for 2009-2010: \$ _____
- 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 2008-2009 year: \$ _____
- 25bt. Type of assistance (Gift, Loan): _____
- 25c. Financial assistance from parents for 2009-2010 year: \$ _____
- 25ct. Type of assistance (Gift, Loan): _____
- 25d. Other financial assistance for 2008-2009 year: \$ _____
- 25dd. Source of assistance: _____
- 25dt. Type of assistance (Gift, Loan): _____
- 25e. Other financial assistance for 2009-2010 year: \$ _____
- 25ed. Source of assistance: _____
- 25et. Type of assistance (Gift, Loan): _____

Prospective Spouse's Financial information

- 26a. Income from work, Summer 2009: \$ _____
- 26b. Income from work, academic year 2009-2010: \$ _____
- 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, 2009: \$ _____

Student's Special Circumstances

29. Please describe your special circumstances below. _____
