



Confidential Family Questionnaire Classes of 2022-2023

Please use estimated income for 2020

Parents:

Address:

City, ST ZIP

Mobile #:

Email:

Student

HS Grad Year

SFC Representative:

This questionnaire will allow us to begin the design of a college funding plan for your family based on your unique circumstances and requirements. The information you provide is **confidential** and will not be shared with anyone outside our group. Please take the time to be as complete and accurate as possible. Our solutions and recommendations will only be valid if the information you supply is accurate and complete. Thanks for placing your confidence in us.



Parent Information*	Parent 1	Parent 2
Name		
Date of Birth		
State of Legal Residence		
Self Empl or Busn Owner?		
Veteran?/ G.I. Benefit \$\$	/	/

Eligibility For Special EFC Considerations (check any of the following that apply)

Parent's Combined income < \$25,000	
Both Parents Eligible to file Form 1040A or 1040EZ	
Parent is a Dislocated Worker	
Qualified for/received Medicaid benefits	
Qualified for/received Supplemental Social Security Income benefits	
Qualified for/received Free or Reduced Price School Lunch Program	
Qualified for/received Temporary Assistance for Needy Families (TANF)	
Qualified for/received Supplemental Nutritional Assistance Program (SNAP)	
Qualified for/received Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	
Child Support Paid	Child Support Received
Elementary/Secondary Tuition Paid	Amount For Primary Student
Education Loan Repayments (Parents)	Years Left
Education Loan Repayments (Parents)	Years Left

Comments, Notes, Additional Information:

* For financial aid purposes, parents are defined as the adult(s) with whom the student resides most of the time, or those who provide more than half the student's support. This may or may not include both natural parents.

Student Information (Use Additional Page if Necessary)	Primary Student	Trailing Student 1	Trailing Student 2	Trailing Student 3
Student Name				
Date of Birth				
High School Graduation Year				

Primary Student				
College(s) of Interest				
Cost of most expensive above				
Student's Annual Income				
Student will be <small>(circle those that apply)</small>	Full-time	On-Campus	Pursuing 4-Year Degree	
Would Consider <small>(circle those that apply)</small>	Live at home	Comm College <small>(2+2)</small>	Work-Study <small>(campus job)</small>	

Parent's W-2 Data	Parent 1 W-2	Parent 1 W-2	Parent 2 W-2	Parent 2 W-2
Employer Name				
Amount in Box 1				

Amount in Box 12a – 12d, only if Letter codes are: D, E, F, G, H, or S

Amount/Letter Code	/	/	/	/
Amount/ Letter Code	/	/	/	/
Amount/Letter Code	/	/	/	/

Family Residence	
Rent or Own? If renting, monthly payment	/
Primary Residence (Current Value/Purchase Price)	/
Mortgage Balance Owed/ Year of Purchase	/
Years Remaining/Interest Rate	/
HELOC: Maximum/Balance Owed	/
Interest Rate/Payment (P&I or Int Only)	/

Parent Tax Information (from IRS Form 1040)

Tax Year Data is Actual or Estimated?		Dependents Claimed	
Wages, Salaries, Tips (1)		Interest (2a/2b - taxable)	/
Qualified Dividends (3a)		Ordinary Dividends (3b)	
IRAs, Pensions, Annuities (4a)		Taxable Portion (4b)	
Social Security Benefits (5a)		Taxable Portion (5b)	
Capital Gain (Loss) (6)		Other Income (7a)	
Adjustments to Income (8a)		Adjusted Gross Income (8b)	
Std or Itemized Deductions (9)		Qual Busn Income Deduct (10)	
Total Tax (16)		Overpayment (20)	
Tax Owed (23)			

Additional Income & Adjustments Schedule 1 Form 1040

Taxable Refunds (Line 10)		Alimony (Line 11)	
Sch C Business Income (line 12)		Gains (Losses) (lines 13-14)	
Rents, royalties, S-Corp (line 17)		Farm Income (line 18)	
Unemployment(line 19)		Other Income (line21)	
Educator& Busn Exp (lines 23-24)		HSA & Moving Exp (lines25-26)	
Deductible Part of SE Tax (line 27)		SEP/Simple/Qual Plans (line28)	
Health Ins Deduction (line 29)		Early Withdraw Penalty (line30)	
Alimony Paid (line 31a)		IRA Deduction (line 32)	
Student Loan Interest (line 33)		TOTAL ADJUSTMENTS (line 36)	

Other Real Estate

Property 1 (Current Value/Purchase Price)	/
Mortgage Balance Owed/ Interest Rate	/
Year of Purchase/Purchase Price	/
Years remaining on mortgage	
Is this property used for business? (Y/N)	
Property 2 (Current Value/Purchase Price)	/
Mortgage Balance Owed/ Interest Rate	/
Year of Purchase/Purchase Price	/
Years remaining on mortgage	
Is this property used for business? (Y/N)	

Self-Employed & Business Owners

Name of Business	
Business Structure (Corp/Part/Sole Prop/LLC/etc.)	
Gross Receipts/Sales	
Expenses	
Business Assets	
Business Debt	
Percent of Ownership	
# of Full Time Employees	
Does student applicant work for the business? (Y/N)	
What service or product does the business provide?	

Comments:

Retirement/Savings/Assets - Parent 1

Plan Description	Type Qual/NQ	Balance	Annual Contribution	Employer Match	Institution
Regular Checking/Sav.	NQ			Note: NQ = Non-retirement Qual = Retirement asset	

Retirement/Savings/Assets - Parent 2

Plan Description	Type Qual/NQ	Balance	Annual Contribution	Employer Match	Institution
Regular Checking/Sav.	NQ			Note: NQ = Non-retirement Qual = Retirement asset	

College Savings	Balance Primary Student	Contribution Primary Student	Balance Other Students	Contribution Other Students
529 Plans				
UGMA				
Student Savings/Assets				
Other (Grandparent 529s, etc.)				

Debts/Amounts Owing

Description	Balance	Int Rate	Required Pmt	Actual Pmt

Life Insurance (personally owned)

Issuing Company	Perm Term	P1/ P2	Cash Value	Face Amount	Premium (Mo/Ann)	Policy Age/Exp

Paying for College

There are three ways to pay for college. Every family will choose some combination of these strategies.

- 1) **Save and Liquidate Savings**
- 2) **Pay-as-You-Go from Income**
- 3) **Borrow and Repay Later**

There are also two payors (after all institutional/government money has been applied):

Parent(s)

Student(s)

Indicate which payment method(s) do you anticipate employing; in what proportions; and who you anticipate will be financially responsible for each. Base these projections on your current thinking, with the understanding that these figures are neither a commitment, nor necessarily your ideal outcome.

(Sum of the percentages of each payment type must total 100%)

Portion of the Total Cost will come from Savings

%

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		

Portion of the Total Cost will come from Income

%

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		

Portion of the Total Cost will come from Borrowing

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		