**2018-2019 School Year   
 Parent Financial Aid Checklis**t

**Instructions:**

* Review and check off each item. Fill in/complete information where request.
* It is preferred that you complete this form on your computer and then print and bring to your meeting.
* It is imperative that this form is completed in its entirety (where applicable) prior to your Financial Aid meeting.

**Parents Nam**e: Click here to enter text.

**Student(s) Name:** Click here to enter text.

**High School:** Click here to enter text.

**Parent Email:** Click here to enter text.

**FSA ID Information – BOTH PARENTS MUST HAVE THEIR OWN INDIVIDUAL ID**

|  |  |  |  |
| --- | --- | --- | --- |
| Parent Name | FSA ID  USERNAME | FSA ID  Password | Email Associated  with FSA ID |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**Parents’ Income Checklist**

1. **Records of Income Earned in 2016, 2017 & 2018 (taxed or untaxed)**

W-2’s Business Distributions

1099s Other (Please list:Click here to enter text. )

1098s

K-1s

1. **Copy of 2016 & 2017 Completed Federal Income Returns**

Personal

Business

1. **Current Residency Mortgage/Home Equity Statements**

1st Mortgage Current Statement

2nd Mortgage Current Statement

Home Equity Line of Credit (HELOC) Current Statement

**Parents’ Asset Checklist**

1. **Current Bank and Investment Statements on all applicable qualified asset accounts**

IRAs  403b  401k

Roth  Pension

Traditional  Profit Sharing

1. **Current Bank and Investment Statements on all applicable unqualified asset accounts**

Savings  Money Market   
 Checking  Employee Stock Ownership Program

CDs  Real Estate

Stocks  529’s, UTMA’s, UGMA’s, Coverdale Accounts

**Parents’ Real Estate Information**

1. **Property 1**

|  |  |
| --- | --- |
| Property Address: | Click here to enter text. |
| Name (s) of Property Owners (s): | Click here to enter text. |
| Percent of Ownership: | Click here to enter text. % |
| Market Value: | Click here to enter text. |
| Rent (if Applicable): | Click here to enter text. |

Property Mortgage Statement

1. **Property 2**

|  |  |
| --- | --- |
| Property Address: | Click here to enter text. |
| Name (s) of Property Owners (s): | Click here to enter text. |
| Percent of Ownership: | Click here to enter text.. % |
| Market Value: | Click here to enter text. |
| Rent (if Applicable): | Click here to enter text. |

Property Mortgage Statement

1. **Property 3**

|  |  |
| --- | --- |
| Property Address: | Click here to enter text. |
| Name (s) of Property Owners (s): | Click here to enter text. |
| Percent of Ownership: | Click here to enter text. % |
| Market Value: | Click here to enter text. |
| Rent (if Applicable): | Click here to enter text. |

Property Mortgage Statement