**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