

Grant & Aid Application Worksheet

Below is the information you will need to have ready to fill out your Grant & Aid application.

1. Applicant and Co-Applicant (if applicable):

- Name and Contact Info
- Social Security #, Date of Birth, Marital Status, Employment Status, Religious Affiliation

2. Student Information - names, birth dates, social security #s

3. Income Information - be prepared to answer information about how you file federal taxes, etc. This will ask if you own a business, farm, etc. You will also likely need to provide additional documentation with your income tax forms, if you do.

4. Non taxable income - Choose ways that you might receive nontaxable income, such as child support, VA Benefits, etc. Pop-up boxes will appear asking you to input the amount you receive and whether it is monthly, weekly, etc.

5. Monthly Expenses

- Rent or Mortgage: _____ per month
- Second Home? Yes or No If Yes, monthly payment: _____
- Home Equity Loan Payments: _____ per month
- Vehicles:
Year _____ Make/Model _____ Payment _____
Year _____ Make/Model _____ Payment _____
- Credit card - Total Debt _____
Total minimum payments per month _____
- Student Loan monthly payments _____
- Other loan debt
Creditor _____ Monthly payment _____
- Child support payments: _____ per month

- Health Insurance premiums payments _____per month
- Vehicle insurance _____annually
- Total Out-of-Pocket Medical Expenses for year _____
- Charitable Contributions (total for year) _____
- College Expenses (Expected contribution)_____
- Child care Expenses for the year _____
- Elder care expenses for the year _____

6. Assets/Liabilities

- Value of cash, savings, and checking accounts _____
- Value of stocks, bonds, mutual funds, or CDs _____
- Value of 529 plan accounts _____
- Expected 2020 contribution to 529 accounts _____
- Value of retirement plan assets _____
- Annual contribution to retirement plan assets _____
- Estimated Value of home _____
- Amount you owe for your home _____
- Estimated value of second home _____
- Amount you owe for second home _____

If your wages come from a "job," you will need to upload your income tax forms from 2018 and your W-2s from 2019. If you have a farm, business, partnership, S corporation, rental property, or estates and trusts, you will also need to upload specific forms that should be part of your income tax packets.