

2012 – 2013 Student Information Worksheet

- Use this worksheet if you prefer to prepare your financial data on paper before entering it in the online Need Access Application at www.needaccess.org. Do not mail or fax a paper worksheet to Access Group.
- For guidance, be sure to refer to the **Student Information Worksheet Instructions** that accompany this worksheet. For questions where these **Instructions** provide a list of possible answers, enter the applicable answer in this worksheet. For example, for question 2k, which asks the student’s marital status, fill in the applicable choice, such as Unmarried; Unmarried, but will be married by 6/1/2013; Separated; or Divorced/Widowed (do not fill in the number shown).
- Please enter all dollar amounts in whole dollars only.

Student Information

1a, 1b, 1c. Name: _____ 1d. Street Address: _____
 1 e. City _____ 1f. State _____ 1g. Zip Code: _____
 1h. Territory/Country: _____ 1i. Area Code/Phone Number: (____) – _____
 1j. E-mail Address: _____ 1k. Social Security Number: _____
 1m. Date of Birth: ____/____/____ 1n. State of Legal Residence: _____

Student’s Academic Plans and Household Information

2a. Degree Objective: _____ 2b. Primary Care Objective (Yes, No): _____
 2c. Completion of Degree Requirements: _____
 2f. U.S. Citizenship Status: _____ 2fa. Alien Registration #/Visa Status: _____
 2h. Last Year Student Claimed by Parent: _____
 2k. Marital Status: _____
 2m. If Married, Marriage Date: (Month/Day/Year) _____
 2n. Will spouse be a student during the 2012-2013 academic year? _____
 c26. Will student and spouse (or prospective spouse) maintain separate households during the summer of 2012? (Yes, No) _____
 2o. Will student and spouse (or prospective spouse) maintain separate households during the 2012-2013 academic year? (Yes, No) _____
 2q. Number of Student's Household Members in College in 2012-2013: _____
 2r. Release of Financial Data to Parents: (Yes, No) _____
 2t. Received Need-Based Aid in 2011: (Yes, No) _____
 2z. Income from Non-U.S. Sources in 2011: (Yes, No) _____

Dependency Status Determination

2ds1. Veteran or Member of U.S. Armed Forces: (Yes, No) _____
 2ds2. Dependents Other than a Spouse: (Yes, No) _____
 2ds3. Orphan, Foster Care, Ward of Court: (Yes, No) _____
 2ds4. Emancipated Minor or in Legal Guardianship: (Yes, No) _____
 2ds5. Unaccompanied Homeless Youth: (Yes, No) _____

Student's (and Spouse's) Annual Income and Expenses

Schools may require one or both years of income and expense data.

	2011	2012 (Estimated)
3a, 4a. Source of Following U.S. Tax Figures:	_____	_____
Completed IRS Form 1040A or 1040EZ; Completed IRS Form 1040; Estimated IRS Form 1040A or 1040EZ;		
Estimated IRS Form 1040; Tax return will not be filed; Completed IRS Form 1040NR, Estimated IRS Form 1040NR		
3b, 4b. Number of Exemptions:	_____	_____
3c, 4c. Adjusted Gross Income from IRS form:	\$ _____	\$ _____
3d, 4d. Itemized Deductions (1040 Schedule A):	\$ _____	\$ _____
3e, 4e. U.S. Income Tax Paid:	\$ _____	\$ _____
3f, 4f. Student's Earned Income:	\$ _____	\$ _____
3g, 4g. Spouse's Earned Income:	\$ _____	\$ _____
3h, 4h. Interest Income:	\$ _____	\$ _____
3i, 4i. Dividend Income:	\$ _____	\$ _____
3j, 4j. Other Taxable Income:	\$ _____	\$ _____
3k, 4k. Earned Income Credit:	\$ _____	\$ _____
3m, 4m. Social Security Benefits:	\$ _____	\$ _____
3n, 4n. AFDC/TANF:	\$ _____	\$ _____
3o, 4o. Child Support Received:	\$ _____	\$ _____
3p, 4p. Other Untaxed Income/Benefits:	\$ _____	\$ _____
3q, 4q. Medical/Dental Expense:	\$ _____	\$ _____
3r, 4r. Elementary/Junior/High School Tuition:	\$ _____	\$ _____
3s, 4s. Number of Children's Tuition Paid for:	_____	_____
3t, 4t. Child Support Paid:	\$ _____	\$ _____
3u, 4u. Education Credits Received:	\$ _____	\$ _____
3v, 4v. Taxable Income Exclusion:	\$ _____	\$ _____

Student's (and Spouse's) Projected Income — 2012-2013

	Summer 2012	Academic Year 2012-20123
5a, 5b. Student's Income from Work:	\$ _____	\$ _____
5c, 5d. Spouse's Income from Work:	\$ _____	\$ _____
5e, 5f. Other Taxable Income:	\$ _____	\$ _____
5g, 5h. Untaxed Income and Benefits:	\$ _____	\$ _____

Student's (and Spouse's) Projected Expenses — 2012-2013

	Summer 2012	Academic Year 2012-20123
5i, 5j. Child Care Expenses:	\$ _____	\$ _____
5k. Unusual Expenses (Description):	_____	_____
5m, 5n. Unusual Expenses (Amounts):	\$ _____	\$ _____
5o. Current Rent/Mortgage:	\$ _____	
5p. Local Taxes – 2011:	\$ _____	

Student's (and Spouse's) Vehicle Information

9c. If Student/Spouse Owns/Leases a Vehicle: (Own, Lease, Own and Lease, None) _____

Vehicle 1. 9d. Year: _____ 9e. Make: _____ 9f. Model: _____

Vehicle 2. 9g. Year: _____ 9h. Make: _____ 9i. Model: _____

c54. Primary Motor Vehicle Purchase Price: \$ _____

Student's (and Spouse's) Summer Expenses

5q. Summer Expenses – 2011: \$ _____

5r. Summer Expenses – 2012: \$ _____

Student's (and Spouse's) Assets

	Value	Debt
6a. Cash, Savings, and Checking Accounts (Today):	\$ _____	
6b, 6c. If Home is Owned, Home:	\$ _____	\$ _____
6d. If Home Is Owned, Year Purchased:	_____	
6e. If Home Is Owned, Home Purchase Price:	\$ _____	
6f, 6g. Other Real Estate:	\$ _____	\$ _____
6h, 6i. Business:	\$ _____	\$ _____
6ia. Small Family-Run Business (Yes, No):	_____	
6j, 6k. Farm:	\$ _____	\$ _____
6m. Family Lives on Farm (Yes, No):	_____	
6n, 6o. Stocks, Bonds, etc:	\$ _____	\$ _____
6p. Contingent Trust Funds:	\$ _____	
6q. Vested Trust Funds:	\$ _____	
6r. Other Assets-Description:	_____	
6s, 6t. Other Assets:	\$ _____	\$ _____
6u. Retirement Accounts Value:	\$ _____	
6x. Cash, Savings, and Checking Accounts	\$ _____	
Projected Balance as of September 1, 2012:		

Student's Education Loans

7a. Federal Loans Owed as of June 1, 2012: \$ _____

7b. Private/Alternative Loans Owed as of June 1, 2012: \$ _____

7c. Other Education Loans Owed as of June 1, 2012: \$ _____

Spouse's Education Loans (Total All Types)

7r. Total Owed as of June 1, 2012: \$ _____

7s. Total to Be Repaid during the 2012-2013 Academic Year: \$ _____

Student's/Spouse's Non-Education Debt

	Owed as of 6/1/2012	To be repaid in 2012-2013
8a, 8b. Credit Card Debt:	\$ _____	\$ _____
8c, 8d. Auto Loan Debt:	\$ _____	\$ _____
8e, 8f. Other Non-Education Debt:	\$ _____	

Student Applicant's Prior Year Financial Aid

10h. School/College/Educational Institution in 2011-2012: _____

10i. Tuition, Fees, Room & Board in 2011-2012: \$ _____

10j. Scholarships or Gift Aid in 2011-2012: \$ _____

10k. Loans and Employment in 2011-2012: \$ _____

10m. Financial Assistance Received from Parents Last Year: \$ _____

Other Student Household Members (Relationship: Student's parent/stepparent; Student's brother/sister; Student's spouse; Student's son/daughter; Student's grandparent; Other)

	(11) Member 1	(12) Member 2	(13) Member 3	(14) Member 4
a. Name:	_____	_____	_____	_____
b. Age:	_____	_____	_____	_____
c. Relationship:	_____	_____	_____	_____

	(15) Member 5	(16) Member 6	(17) Member 7	(18) Member 8
a. Name:	_____	_____	_____	_____
b. Age:	_____	_____	_____	_____
c. Relationship:	_____	_____	_____	_____

Student's Employment

	Summer 2012	Academic Year 2012-2013
20i. Employer:	_____	20n. _____
20j. Type of Work:	_____	20o. _____
20k. Number of Weeks Employed:	_____	20p. _____
20m. Weekly Earnings:	\$ _____	20q. \$ _____

Spouse's or Prospective Spouse's Employment

	Summer 2012	Academic Year 2012-2013
21i. Employer:	_____	21n. _____
21j. Type of Work:	_____	21o. _____
21k. Number of Weeks Employed:	_____	21p. _____
21m. Weekly Earnings:	\$ _____	21q. \$ _____

Student's Education History

22a. Number of Prior Undergraduate/Graduate Institutions Attended: _____

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: _____

22o. Institution 5 Name: _____

22p. Dates of Attendance: _____ 22q. Degree Awarded: _____

22r. Institution 6 Name: _____

22s. Dates of Attendance: _____ 22t. Degree Awarded: _____

22u. Institution 7 Name: _____

22v. Dates of Attendance: _____ 22w. Degree Awarded: _____

22x. Institution 8 Name: _____

22y. Dates of Attendance: _____ 22z. Degree Awarded: _____

Previous Undergraduate Degree Financial Aid

	Grants	Loans
23a, 23b. Undergraduate Studies:	\$ _____	\$ _____

Previous Graduate Degree Financial Aid

	Grants	Loans
23c, 23d. Graduate Studies:	\$ _____	\$ _____

Student's Current Degree Financial Aid

	Grants	Loans
23 e, 23f. Current Degree:	\$ _____	\$ _____

Student in Default on Loans

23p. In Default on a Federal Loan (Yes, No): _____

23q. Explanation of Default (if any): _____

Spouse's Education and Financial Aid History

24a, 24b. Spouse's First and Last Name: _____

24c. Spouse's Age: _____

If Spouse will be enrolled at least half time in 2012-2013:

24d. Type of Institution Attending (Undergraduate, Graduate/Professional): _____

- 24e. Name of Institution Attending: _____
- 24f. State Location of Institution: _____
- 24g. Estimated Tuition for 2012-2013: \$ _____
- 24h. Year in School in 2012-2013 (First Year, Second Year, Third Year, Fourth Year, Fifth Year, Sixth Year, Seventh Year or Later): _____
- 24i. Applied for Financial Aid for 2012-2013 (Yes, No): _____
- 24j. Status of Grants for 2012-2013 (None, Granted, Pending): _____
- 24k. Amount of Grants for 2012-2013: \$ _____
- 24m. Status of Loans 2012-2013 (None, Granted, Pending): _____
- 24n. Amount of Loans for 2012-2013: \$ _____
- 24o. Last Degree Awarded to Spouse: _____
- 24p. Dates Attended for Last Degree: _____
- 24q. Major Field of Last Degree: _____

Student's (and Spouse's) Other Resources

25a. Student's Other Scholarships/Grants for 2012-2013 Academic Year: \$ _____

Financial Assistance from Parents

- 25b. Assistance from Student's Parents for Academic Year 2011-2012: \$ _____
- 25bt. Type of assistance (Gift, Loan): _____
- 25c. Assistance from Student's Parents for Academic Year 2012-2013: \$ _____
- 25ct. Type of assistance (Gift, Loan): _____

Other Financial Assistance

- 25d. Assistance from Others for Academic Year 2011-2012: \$ _____
- 25dd. Source of Other Assistance: _____ 25dt. Type of Assistance (Gift, Loan): _____
- 25e. Assistance from Others for Academic Year 2012-2013: \$ _____
- 25ed. Source of Other Assistance: _____ 25et. Type of Assistance (Gift, Loan): _____

Prospective Spouse's Financial Information

- 26a. Income from Work, Summer 2012: \$ _____
- 26b. Income from Work, Academic Year 2012-2013: \$ _____
- 26c. If Home Is Owned, Home Value: \$ _____
- 26d. If Home Is Owned, Home Debt: \$ _____
- 26e. If Home is Owned, Year Purchased: _____
- 26f. If Home is Owned, Home Purchase Price: \$ _____
- 26g. Retirement Account Value: \$ _____
- 26j. Cash, Savings, and Checking Accounts Projected Balance as of September 1, 2012: \$ _____

