



Required Personal/Financial Information Worksheet

Having the necessary personal and financial information ready when you begin the PFS process will shorten the time it takes to complete the form and make the process smoother. Before you begin, gather the relevant items listed below. In addition, you should check with the school(s) to which you will be applying to determine if they have any additional forms they require..

Student Applicant Information

- Social Security Number for each applicant
- Cost of camps and lessons
- Student asset information
- Annual student earnings

Parent Income Information

- Tax returns, W-2 forms
- Bank statements
- Dividend statements
- Self-employment information (Business/Farm)

Parent Non-taxable Income Information

- Payments to tax deferred pensions and savings plans
- Pre-tax contributions or employer provided untaxed income from fringe benefit plans (cafeteria or 125 plans)
- Cash support received from relatives and friends
- Household financial contributions paid by other non-dependent household members
- Dollar value of housing, food, and other household expenses paid to you as a member of the clergy, military, or other occupation
- Income from tax-exempt investments
- IRA Keogh/SEP information
- Social security benefits received for the family
- Welfare benefits
- Workers compensation
- Veterans benefits
- Income earned abroad

Parent Asset Information

- Home purchase and mortgage information
- Home insurance information
- Face value of parents' life insurance policies

Divorced/Separated or Never Married Parent Information

- Alimony/child support
- Amounts of household expenses/money paid by divorced or separated parents in lieu of child support

Debt/Expense Information

- Mortgage debt
- Consumer debt
- Medical debt and expenses
- Childcare expenses for employment reasons
- Rent, if home is not owned
- Annual cost of clubs if over \$250
- Annual cost of vacations
- Total car debt if owned and/or annual lease cost
- Total RV/boat debt