



College Aid Pros Inc.

2015 - 2016

Family Information Update

Student's Full Name: _____

Attending Which College or University: _____

Check **Which Semesters** they will be attending the above school: (check all appropriate boxes)

Fall '15 _____ Winter '15 _____ Spring '16 _____ Summer '16 _____

Indicate their **Enrollment Status** for EACH semester: (F = Full Time, P = Part Time)

Fall '15 _____ Winter '15 _____ Spring '16 _____ Summer '16 _____

Indicate their **Housing Status** for EACH semester: (1 = On Campus, 2 = Off Campus, 3 = Commuter)

Fall '15 _____ Winter '15 _____ Spring '16 _____ Summer '16 _____

If student will attend Winter '15/Summer '16 or Study Abroad sessions (specify which session), please indicated where and how many credits:

• _____

15-16 Expected **Grade Level**: (check one) FR _____ SO _____ JR _____ SR _____ **GPA**: _____

Total expected **Credits** by start of Fall 2015 accumulated: _____ **Major**: _____

Student's Financial Information:

Checking/Savings: \$ _____ Money Market/CD's: \$ _____ Mutual Funds: \$ _____

Stocks: \$ _____ Bonds: \$ _____ Trust Funds: \$ _____ UTMA/UGMAs: \$ _____

Will the student be filing **Federal 2014 Taxes**: Yes _____ No _____

• List all estimated wages in 2014: (indicate N/A if applicable) \$ _____

• List all other estimated 2014 income and its source: (indicate N/A if applicable)

• _____

• _____

• _____

Parent's Financial Information:

Do you have any assets held with Allianz products that we service for you? Yes _____ No _____

Assets (Non-Retirement):

Checking/Savings: \$ _____ Money Market/CD's: \$ _____ Mutual Funds: \$ _____

Trust Funds: \$ _____ Stocks: \$ _____ Bonds: \$ _____ 529/TAP: \$ _____

Parent's Retirement Accounts: (e.g.: IRA, 401k, 403b, SEP, Annuity, Pension, etc.)

<u>Type Of Account</u>	<u>In Who's Name</u>	<u>Current Value</u>
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Change in parent's **Marital Status:** Yes: _____ No: _____ If Yes, Please Indicate: _____

Date of current marital status (marriage, separation, divorce, etc.) _____

Indicate **Number Of Family Members Living In Home For 15-16:** (include grandparents, college students, all children and parents) _____

Indicate **Number Of Family Members In College For 15-16:** (including parents if attending college) _____

Family Member Information: (list all members even if not in school)

<u>Name</u>	<u>School</u>	<u>15-16 Grade Level</u>	<u>Cost</u>
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

_____ \$ _____

Primary Residence:

Mortgage: Yes _____ No: _____ **Rent:** Yes: _____ No: _____ **None:** _____ (explain below)

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Current Market Value: \$ _____ Year Purchased: _____

If New Home Indicate: Purchase Price: \$ _____ Total Number of Payments Left: _____

Explanation: _____

Home Equity:

If None, Please Indicate: N/A _____

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Available Balance: \$ _____ Total Number of Payments Left: _____

Other Real Estate:

If None, Please Indicate: N/A _____

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Current Market Value: \$ _____ Purchase Price: \$ _____

Year Purchased: _____ Total Number of Payments Left _____

Type of Property (*vacation home – time-share - rental property – land – etc.*)

Outstanding Balance: \$ _____ Monthly Payment: \$ _____

Current Market Value: \$ _____ Purchase Price: \$ _____

Year Purchased: _____ Total Number of Payments Left _____

Type of Property (*vacation home – time-share - rental property – land – etc.*)

PLEASE LIST ADDITIONAL PROPERTIES ON A SEPARTATE PIECE OF PAPER

Other Income:

Amount of **CHILD SUPPORT RECEIVED** for Student: \$ _____

How is it paid: Weekly: _____ Biweekly: _____ Monthly: _____ Yearly: _____

Date support will end: _____ ***In None, Please Indicate: N/A*** _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT RECEIVED** for Siblings: \$ _____

How is it paid: Weekly: _____ Biweekly: _____ Monthly: _____ Yearly: _____

Date support will end: _____ ***In None, Please Indicate: N/A*** _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT PAID** for Student: \$ _____

How is it paid: Weekly: _____ Biweekly: _____ Monthly: _____ Yearly: _____

Date support will end: _____ ***In None, Please Indicate: N/A*** _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **CHILD SUPPORT PAID** for Siblings: \$ _____

How is it paid: Weekly: _____ Biweekly: _____ Monthly: _____ Yearly: _____

Date support will end: _____ ***In None, Please Indicate: N/A*** _____

Is Support Court-Ordered? Yes: _____ No: _____

Amount of **Social Security Benefits** Received: \$ _____ ***If None, Please Indicate: N/A*** _____

- By whom? _____
- Start date _____ End date _____

Amount of **Workers Compensation** Received: \$ _____ *If None, Please Indicate: N/A* _____

- By whom? _____
- Start date _____ End date _____

Amount in **Disability Payments** Received: \$ _____ *If None, Please Indicate: N/A* _____

- By whom? _____
- Start date _____ End date _____

Parental Employment Information:

Change in **Parent's Employment**: Yes: _____ No: _____ *If None, Please Indicate: N/A* _____

For Whom: Father: _____ Mother: _____

New Employer's Name & Address:

- Name: _____
- Street: _____
- City, State, Zip: _____

Reason for Change in Employment: _____

Was **Unemployment Compensation** Received? Yes: _____ No: _____ *If None, Please Indicate: N/A* _____

If Yes, By Whom? _____

Start date: _____ End date: _____

Amount received \$ _____ Please Indicate: Monthly: _____ Biweekly: _____ Yearly: _____

Will there be a **Significant Increase Or Decrease In 2014 Income**? Yes: _____ No: _____

If yes, indicate amount of difference: \$ _____ By whom: _____

Has either parent **Filed For Bankruptcy** in the last 7 years? Yes: _____ No: _____

- Date of bankruptcy: _____
- Date of discharge: _____

Are there any **Serious Credit Issues** such as foreclosure, sheriff sale, lien, or delinquency on your credit report?

Yes: _____ No: _____ Identify issue: _____

Tuition Payments:

List all tuition payments for Elementary/Middle/High School being paid for 2014 school year:

<u>Student</u>	<u>School</u>	<u>Amount</u>
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____
_____	_____	\$ _____

Current Email Address:

(Emails are only used to setup online access to financial aid & CAP Notices/Newsletters. For added security, each profile is required their own email address.)

Student's Email Address: _____

Mother's Email Address: _____

Father's Email Address: _____

Please Return To Our Office By: **December 31, 2014**

If there are any significant changes to your family's financial situation, please indicate on a separate piece of paper or contact us with further details at 610-601-4052. We look forward to working with you again this year.

Thank You!