

CSS FINANCIAL AID PROFILE WORKSHEET

You should answer the following questions on this worksheet to help provide information on the CSS Profile. Finding the answers to some of the harder questions in advance will help you to seamlessly complete the Profile so you are portraying your family's situation accurately. It can help you obtain valuable institutional aid from some of America's best colleges and universities! Please also create Profile log-in at: cssprofile.collegeboard.org in advance.

⇒ **Federal Income Tax Returns** for parents and student (please have all parts of the actual returns filed as you may be asked about schedules filed with the returns)

Parent Occupation	Employer Name	# years at current employment
_____	_____	_____
_____	_____	_____
_____	_____	_____

Complete the information above for each parent or guardian you have listed on the Profile.
(A section to complete with the above info will open for each one.)

⇒ **Retirement plan type and current value for each parent above (if any):**

Type of plan (401K, pension, IRA)	Current value of plan*
_____	\$ _____
_____	\$ _____

* Parent should have statement(s) with current value.

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Family housing information:

Own primary home:	Monthly mortgage payment	\$ _____
	Year home was bought	_____
	Purchase price	\$ _____
	Current market value	\$ _____
	Total amount still owed	\$ _____
Rent primary home:	Monthly rent payment	\$ _____

⇒ Asset information for parent(s) and student (list amounts for any of these asset types):

	Parent(s)	Student
Cash savings, and checking	\$ _____	\$ _____
Investments (stocks, Money Market, etc.)	\$ _____	\$ _____
Current value of “other” ** real estate	\$ _____	\$ _____

** Includes rental properties, second homes, land ownership, vacation properties

Business or farm ownership (any size) be prepared to answer detailed questions about this including:

- ◇ % ownership of business (e.g. 100%, 75%, etc.)
- ◇ Business name and address
- ◇ Date business was established
- ◇ Current market value of business
- ◇ Current amount owed on business
- ◇ Gross receipts and expenses from business as reported on 2024 IRS form 1040 Schedules C or E

Do you need more information to plan your re-entry to college or to discuss financial aid?

Please contact College Depot at 602-261-8847 to schedule an appointment with an advisor.

Last Revised: 09/06/2024