

FAMILY FINANCIAL STATEMENT



Student Name:

SFC Financial Adviser:

SFC Admissions Adviser:

SFC Assessment Adviser:

This questionnaire will allow us to design a college funding plan for your family based on your unique circumstances and requirements. The information you provide is **confidential** and will not be shared with anyone outside our company. Our recommendations are based solely on the information you provide. Please be honest and accurate.

Thanks for placing your confidence in us.

Additional Information Needed

Please upload to your SFC Financial Adviser via Secure Send on the Website

- Prior year Form 1040 including all schedules
- Prior year W-2 forms corresponding with Form 1040 above
- Prior year business tax returns (Form 1120, 1120S, 1065, etc.)
- Prior year student tax return and W-2s if available

General Family Information

Note: Parents are defined as the adults with whom the student applicant lives more than 50% of the time. If parent(s) with whom the student resides are married or remarried, complete this form for yourself, your spouse, and the student. If parent with whom the student resides is unmarried, never married, widowed, separated or divorced complete this form only for yourself and the student.

Parent 1/Father/ Stepfather _____
Natural Parent? Y/N Current Age ____
College(s) Attended & Degrees _____

Parent 2/Mother/Stepmother _____
Natural Parent? Y/N Current Age ____
College(s) Attended & Degrees _____

If Natural Parents Are Separated or Divorced:
Date of Separation ____ | ____ Date of Divorce ____ | ____

Please list dependent children and other members of your household for whom you provide financial support.

Full Name	Current Age	Current Grade	Yr. of HS Graduation

Please describe any unusual circumstances that may affect your eligibility for financial aid, or your ability to contribute toward college costs. Examples include unusual or excessive medical costs, loss of a job, an elderly relative you support, special needs child, etc.

Nontaxable Household Income & Benefits

Child Support Received (Annually)	\$ _____
Child Support Paid (Annually)	\$ _____
Total Social Security Benefits Received	\$ _____
Parent Social Security Amount	\$ _____
Student Social Security Amount	\$ _____

Parent's Savings, Investments & Real Estate
(Do not include retirement plans in this section)

Checking & Savings	\$ _____
529 Savings For Student	\$ _____
529 Savings For Student's Siblings	\$ _____
Nonqualified Investments ¹	\$ _____
Loans due to you	\$ _____
Current value of your primary residence	\$ _____
Purchase Price	\$ _____
Year Purchased	_____
1 st Mortgage balance on primary residence	\$ _____
2 nd Mortgage or home equity loan balance	\$ _____

1) *Nonqualified investments include stocks, bonds, mutual funds, money markets, CDs, trust funds and any other investments that are not part of a qualified retirement plan.*

Note: If you own investment or rental real estate, please include current market value, year of purchase, purchase price and amount owed on each property below.

Parent's Qualified Plans, Insurance & Annuities
(Please refer to most recent statements)

	Parent 1	Parent 2
Traditional IRA	\$ _____	\$ _____
Keough/SEP/Other	\$ _____	\$ _____
Roth IRA	\$ _____	\$ _____
401(k)/403(b)/other	\$ _____	\$ _____
Permanent Life Insurance Cash Value	\$ _____	\$ _____
Annuity Contracts	\$ _____	\$ _____

Student's Income

Will student file a tax return?	Yes – No
Adjusted Gross Income (tax filers only)	\$ _____
Federal Taxes Paid (NOT WITHHOLDING)	\$ _____
Student's Annual Income from Work	\$ _____
Contributions to IRA	\$ _____
Social Security Benefits Received	\$ _____

Student's Savings & Investments

Checking & Savings	\$ _____
UGMA/UTMA Account	\$ _____
Traditional IRA	\$ _____
Roth IRA	\$ _____
Cash Value of Insurance	\$ _____
Trust Fund	\$ _____
Private School Tuition For All Children	\$ _____
Private School Tuition For Student	\$ _____

Calculating Your Money For College

TOTAL AFTER TAX INCOME/MO.	\$ _____
TOTAL MONTHLY EXPENSES	\$ _____
INCOME – EXPENSES (DISPOSABLE INCOME/MO.)	\$ _____
ANNUAL DISPOSABLE INCOME	\$ _____

Please answer the following questions. Do not leave this section blank. It's important!
To fund a four-year college education, how much do you expect to contribute from each of the following for **each year of college**?

- Disposable Inc. \$ _____
- Parent Savings \$ _____
- Student savings \$ _____
- Student income \$ _____
- Parent loans \$ _____
- Student loans \$ _____
- Other \$ _____

Annual Total	\$ _____	Four Year Total	\$ _____
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