



College Funding Estimator

2010-2011 School Year

STEP ONE: STUDENT INFORMATION

Name: _____
 Address: _____ City: _____
 State: _____ ZIP: _____ Email: _____
 State of Legal Residence: _____ Date of Birth: _____
 Marital Status: Single, Divorced, Widowed Married Separated
 Will you have your first bachelor's degree before July 1, 2010? Yes No

STEP TWO: STUDENT INCOME AND ASSET INFORMATION *(to be completed by ALL students)*

In 2008 or 2009, did you or anyone in your household receive benefits from any of the following federal programs?

SSI Food Stamps Free or Reduced Price Lunch TANF WIC

As of today, are you (or your spouse) a dislocated worker? Yes No

Use estimated or completed 2009 income tax returns.

Will you file a 2009 income tax return?	Yes <input type="radio"/>	No <input type="radio"/>
Are you eligible to file a 1040A, 1040EZ?	Yes <input type="radio"/>	No <input type="radio"/>
2009 Adjusted Gross Income:	\$ _____	
2009 U.S. Income Tax: (amount from IRS tax tables, based on taxable income)	\$ _____	
2009 Number of Exemptions: (if claimed by parents, put 0)	_____	
2009 Student and spouse's income earned from work:	\$ _____	Student
(W2 forms or IRS Form 1040 line 7 + 12 + 18 + Box 14 of Schedule K1 form 1065)	\$ _____	Spouse
2009 Additional Financial Information: (i.e. child support paid, Work-Study earnings, Hope and Lifetime Learning Tax Credits, Combat pay included in AGI, earnings from a cooperative education program through the college)	\$ _____	
2009 Untaxed Income: (i.e. child support received, 401(k) and untaxed IRA contributions)	\$ _____	
Current balance of cash, savings and checking accounts:	\$ _____	
Current net worth of investments: (exclude your home and retirement plans)	\$ _____	
Current net worth of business: (exclude a business you own and control with less than 100 full-time employees)	\$ _____	

STEP THREE: STUDENT STATUS

Were you born before January 1, 1987? Yes No

As of today are you married? (answer "Yes", if you are separated) Yes No

Will you begin the 2010-2011 school year working on a master's or doctorate program? Yes No

Are you currently serving on active duty in the US Armed Forces for purposes other than training? Yes No

Are you a veteran of the US Armed Forces? Yes No

Do you have children who receive more than half their support from you? Yes No

Do you have dependents (other than your children or spouse) who live with you and who receive more than half their support from you, now and through June 30, 2011? Yes No

Were you an orphan, ward of court, or in foster care at any time since you were 13 years old? Yes No

Are you in legal guardianship or determined to be an emancipated minor? Yes No

Since July 1, 2009, were you officially determined to be an unaccompanied youth who was homeless or in danger of becoming homeless? Yes No



If you answered "No" to every question in Step Three, complete Steps Four and Five.
 If you answered "Yes" to any question in Step Three, answer the following two questions and submit this form.

Number in your household in 2010-2011:	
College students in your household in 2010-2011: (include yourself)	

STEP FOUR: PARENT INFORMATION

Parents' marital status as of today: Married Single Divorced/Separated Widowed
 Number in your parents' household in 2010-2011: _____
 College students in your parents' household in 2010-2011: (include yourself, but not your parents) _____
 Parents' state of legal residence: _____
 Father's/stepfather's date of birth: _____ Mother's/stepmother's date of birth: _____

STEP FIVE: PARENT INCOME AND ASSET INFORMATION

In 2008 or 2009, did you or anyone in your household receive benefits from any of the following federal programs?
 ___SSI ___Food Stamps ___Free or Reduced Price Lunch ___TANF ___WIC
 As of today, are either of your parents a dislocated worker? Yes No

Use estimated or completed 2009 income tax returns.

Will you file a 2009 income tax return?	Yes <input type="radio"/>	No <input type="radio"/>
Are you eligible to file a 1040A, 1040EZ?	Yes <input type="radio"/>	No <input type="radio"/>
2009 Adjusted Gross Income:	\$	
2009 U.S. Income Tax: (amount from IRS tax tables, based on taxable income)	\$	
2009 Number of Exemptions:		
2009 Parents' income earned from work: (W2 forms or IRS Form 1040 line 7 + 12 + 18 + Box 14 of Schedule K1 form 1065)	\$	Father
	\$	Mother
2009 Additional Financial Information: (i.e. child support paid, Work-Study earnings, Hope and Lifetime Learning Tax Credits, Combat pay included in AGI)	\$	
2009 Untaxed Income: (i.e. child support received, 401(k) and untaxed IRA contributions)	\$	
Current balance of cash, savings and checking accounts:	\$	
Current net worth of investments: (exclude your home and retirement plans)	\$	
Current net worth of business: (exclude a business you own and control with less than 100 full-time employees)	\$	



Use this worksheet to run the *College Funding Estimator* at EducationQuest.org for immediate results.

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