

Student's Name: Last: _____, First: _____ MI: _____

2012-2013

UPDATED INFORMATION REQUEST

To ensure that your student's file is accurate for this upcoming year, please return form. If info is the same as last year, please indicate.

Student's Information:

Checking/Savings--\$ _____ Bonds--\$ _____ Mutual Funds--\$ _____
Money Market/CD's--\$ _____ Stocks--\$ _____ Trust Funds--\$ _____

Attending what College or University: **12-13 Housing Status: (Select one)** **Attending Status: (Select one)**

Fall 12: _____	On Campus	Off Campus	With Parents	Full time	Part time
Winter 12: _____	On Campus	Off Campus	With Parents	Full time	Part time
Spring 13: _____	On Campus	Off Campus	With Parents	Full time	Part time
Summer 13: _____	On Campus	Off Campus	With Parents	Full time	Part time

If student will attend winter 12/summer 13 or study abroad sessions (specify which session), please indicate where and how many credits:

12-13 Expected Grade Level – Freshman Sophomore Junior Senior **GPA:** _____

Total expected credits by start of Fall 2012 accumulated: _____ aa Major: aaaaaaaaa _____

Is student filing Federal 2011 taxes: Yes No

- List all estimated wages in 2011 \$ _____
- List all other estimated 2011 income and its source _____

Parent's Information:

Do you have any assets held with any of the following investment companies at our firm?

RBC Dain/Security Benefit/Allianz Yes No

Assets (non-retirement):

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

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

Retirement Accounts (eg: IRA, 401k, 403b, SEP, Annuity, etc.)

<u>Type of account</u>	<u>In who's name</u>	<u>Current value</u>
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_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

College Aid Professionals, LLC 40 W. Germantown Pike, Suite 201 East Norriton, PA 19401
Phone: 610-631-9977 Fax: 610-631-1101

of family members living in home for 12 - 13 (include grandparents, college students, all children and parents) _____

of family members in college for 12 - 13 (including parents if attending college) _____

Family member information: (list all members even if not in school)

<u>Name</u>	<u>School</u>	<u>12-13 Grade Level</u>	<u>Cost</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Primary Residence:

Mortgage/Rent

if "none, please select

N/A

Outstanding Balance: \$ _____ Monthly Payment: \$ _____
 Current Market Value: \$ _____ Year purchased: _____
 If new home list: purchase price \$ _____ Total number of payments left: _____

Home Equity

if none, please select

N/A

Outstanding Balance: \$ _____ Monthly Payment: \$ _____
 Available Balance: \$ _____ Total number of payments left: _____

Other Real Estate

if none, please select

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 prop/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 prop/land/etc.) _____

PLEASE LIST ADDITIONAL PROPERTIES IN A WORD DOCUMENT & SEND TO CAP AT: admin@affordablecollege.com

Amount of child support received for student: \$ _____ weekly biweekly monthly yearly
 Date support will end: _____ *if none, please select* **N/A**

Amount of child support received for siblings: \$ _____ weekly biweekly monthly yearly
 Date support will end: _____ *if none, please select* **N/A**

Change in parent's marital status: Yes No (if yes please list) _____

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

Amount of Social Security benefits received --\$ _____ if none, please select **N/A**
By whom? _____
Start date: _____ End date: _____

Workers Compensation --\$ _____ if none, please select **N/A**
By whom? _____
Start date: _____ End date: _____

Disability Payments -- \$ _____ if none, please select **N/A**
By whom? _____
Start date: _____ End date: _____

Change in parent's place of employment/new employer's address: Yes No
(If yes please explain) _____

Was unemployment received? Yes No If yes, by whom? _____
Start date: _____ End date: _____
Amount received \$ _____ monthly bi-weekly yearly

Will there be a significant increase or decrease on 2011 income? N/A
If yes, indicate amount of difference \$ _____ & by whom? _____

Do you foresee a significant increase or decrease on 2012 income? N/A
If yes, indicate amount of difference \$ _____ & by whom? _____

Has either parent filled for bankruptcy in the last 10 years? Yes No
If yes list Date of bankruptcy: _____
Date of discharge: _____

Are there any serious credit issues such as foreclosure, sheriff sale, lien, or delinquency on your credit report?

Phone Number: Home #: _____

Father's Cell #: _____ Work #: _____
Mother's Cell #: _____ Work #: _____

Email Address: (Emails are only used to setup online access to financial aid & CAP Notices/News Letters. For added security,
..... each profile requireg their own email address.)

Student Email Address: _____
Mother's Email Address: _____
Father's Email Address: _____



If there are any significant changes to your family's financial situation, please indicate in a Word Document and send to CAP at: admin@affordablecollege.com
or contact your counselor with further details at (610) 631-9977. ---We look forward to be working with you again this year. Thank You