

## Documents for 2022-23 FAFSA & CSS Profile

Here are the documents needed to complete FAFSA and CSS Profile applications for financial aid.  
*You may need only some of these forms, depending on your financial situation.*

### Income

<b><u>Parent/s</u></b>	<b>FAFSA</b>	<b>CSS Profile</b>
<b>2020 Federal Tax Returns</b>		
Form 1040	<b>X</b>	<b>X</b>
Form 1040, Schedule 1 - Additional Income and Adjustments to Income	<b>X</b>	<b>X</b>
Form 1040, Schedule 2 - Additional Taxes	<b>X</b>	<b>X</b>
Form 1040, Schedule 3 - Nonrefundable Credits		<b>X</b>
Form 1065, Schedule K - Partner's Share of Income, Deductions, etc.	<b>X</b>	
Form 2555 - Foreign Earned Income Exclusion		<b>X</b>
Form 8959 - Additional Medicare Tax		<b>X</b>
2020 W-2s	<b>X</b>	<b>X</b>
2020 Social Security SSA-1099		<b>X</b>

<b><u>Student</u></b>	<b>FAFSA</b>	<b>CSS Profile</b>
<b>2020 Federal Tax Returns</b>		
Form 1040	<b>X</b>	<b>X</b>
Form 1040, Schedule 3 - Nonrefundable Credits		<b>X</b>
2020 W-2s	<b>X</b>	<b>X</b>

## Assets

<b>Parent/s &amp; Student</b>	<b>FAFSA</b>	<b>CSS Profile</b>
Accounts - balances on date of filing		
Savings	<b>X</b>	<b>X</b>
Checking	<b>X</b>	<b>X</b>
CDs (Certificates of Deposit)	<b>X</b>	<b>X</b>
Brokerages includes: stocks, stock options, savings bonds, bonds, mutual funds, money market funds	<b>X</b>	<b>X</b>
529 college savings plans	<b>X</b>	<b>X</b>
Pre-paid tuition plans	<b>X</b>	<b>X</b>
Other college savings plans (Coverdell)	<b>X</b>	<b>X</b>
Non-qualified (non-retirement) annuities	<b>X</b>	<b>X</b>
Trust funds	<b>X</b>	<b>X</b>
Commodities, precious and strategic metals	<b>X</b>	<b>X</b>
Installment and land sale contracts (including seller-financed mortgages)	<b>X</b>	<b>X</b>
Retirement Accounts (pension, annuity, and savings plans such as an IRA, Roth IRA, Keogh, SEP, 401(a), 401(k), 403(b), 408, 457, 501(c))		<b>X</b>

<b>Parent/s</b>	<b>FAFSA</b>	<b>CSS Profile</b>
Properties - value and statement on date of filing		
Primary home - current market value		<b>X</b>
Primary home - mortgage statement		<b>X</b>
Second properties - current market value	<b>X</b>	<b>X</b>
Second properties - mortgage statement	<b>X</b>	<b>X</b>
Form 1040, Schedule E - for rental properties		<b>X</b>

## Other financial info

<b>Parent/s</b>	<b>FAFSA</b>	<b>CSS Profile</b>
Businesses owned - value on date of filing, 2020 Federal Tax Returns		
Equity value of business	<b>X</b>	<b>X</b>
Form 1040, Schedule C - Sole Proprietor		<b>X</b>
Form 1040, Schedule E & Form 1065 - Partnership		<b>X</b>
Form 1040, Schedule E & Form 1120 - Corporation		<b>X</b>
Form 1120 - U.S. Corporation Income Tax Return		<b>X</b>
Form 1065, Schedule K - Partner's Share of Income, Deductions, etc.		<b>X</b>

<b>Parent/s</b>	<b>FAFSA</b>	<b>CSS Profile</b>
Expenses - both 2020 and estimated for 2021		
Private School tuition paid, includes books, housing, meals		<b>X</b>
Medical & dental costs not covered by insurance includes premiums, co-pays, out-of-pocket		<b>X</b>
Student loan statements for parent education		<b>X</b>
Parent loan statements for student applicant		<b>X</b>
Parent loan statements for siblings		<b>X</b>