

Financial documents for 2024-25 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

<u>Parent/s</u>	FAFSA	CSS Profile
2022 Federal Tax Returns		
Form 1040	X	X
Form 1040, Schedule 1 - Additional Income and Adjustments to Income	X	X
Form 1040, Schedule 2 - Additional Taxes		X
Form 1040, Schedule 3 - Nonrefundable Credits		X
2022 W-2s		X
2022 Social Security SSA-1099		X

<u>Student</u>	FAFSA	CSS Profile
2022 Federal Tax Returns <i>(if applicable)</i>		
Form 1040	X	X
Form 1040, Schedule 3 - Nonrefundable Credits		X
2022 W-2s	X	X

Assets

Parent/s & Student	FAFSA	CSS Profile
Accounts - <i>balances on date of filing</i>		
Savings	X	X
Checking	X	X
CDs (Certificates of Deposit)	X	X
Brokerages includes: stocks, stock options, savings bonds, bonds, mutual funds, money market funds	X	X
529 college savings plans	X	X
Pre-paid tuition plans (refund value)	X	X
Other college savings plans (Coverdell)	X	X
Non-qualified (non-retirement) annuities	X	X
Trust funds	X	X
Commodities, precious and strategic metals	X	X
Installment and land sale contracts (including seller-financed mortgages)	X	X
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))		X

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

Other financial info

<u>Parent/s</u>	FAFSA	CSS Profile
Businesses owned - <i>value on date of filing, 2022 Federal Tax Returns</i>		
Net worth of business (Tangible assets - business-backed debts)	X	X
Form 1040, Schedule C - Sole Proprietor		X
Form 1040, Schedule E & Form 1065 - Partnership		X
Form 1040, Schedule E & Form 1120 - Corporation		X

<u>Parent/s</u>	FAFSA	CSS Profile
Expenses - <i>both 2022 and estimated for 2023</i>		
Private School tuition paid, includes books, housing, meals		X
Medical & dental costs not covered by insurance includes premiums, co-pays, out-of-pocket		X
Student loan statements for parent education		X
Student loan statements for student applicant		X
Student loan statements for siblings		X