

## Financial documents for 2026-27 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

Parent/s	FAFSA	CSS Profile
2024 Federal Tax Returns		
Form 1040	✓	✓
Form 1040, Schedule 1 - Additional Income and Adjustments to Income	✓	✓
Form 1040, Schedule 3 - Nonrefundable Credits		✓
2024 child support received	✓	✓
2024 W-2s		✓
2024 1099s		✓
2024 Social Security SSA-1099		✓

Student	FAFSA	CSS Profile
2024 Federal Tax Returns (if applicable)		
Form 1040	✓	✓
Form 1040, Schedule 3 - Nonrefundable Credits		✓
2024 W-2s	✓	✓

## Assets

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

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

## Other financial info

<u>Parent/s</u>	FAFSA	CSS Profile
Businesses owned - value on date of submission, 2024 Federal Business Tax Returns		
Value of business (generally considered tangible assets)	✓*	✓
Debt outstanding on business	✓*	✓
Form 1040, Schedule C - Sole Proprietor		✓
Form 1040, Schedule E & Form 1065 - Partnership		✓
Form 1040, Schedule E & Form 1120 or Form 1120-S - Corporation		✓

<u>Parent/s</u>	FAFSA	CSS Profile
Expenses - both 2024 and estimated for 2025		
Medical & dental costs not covered by insurance includes premiums, co-pays, out-of-pocket		✓
Student loan statements for parent education		✓
Parent loan statements for student applicant education		✓
Parent loan statements for sibling education		✓
Alimony paid		✓
Child support paid		✓

Expenses - both 2025-26 and estimated for 2026-27		
Sibling private school: 1. cost of attendance; 2. grants received and 3. total educational expenses paid		✓
Sibling university: 1. cost of attendance; 2. grants received and 3. total educational expenses paid		✓

\* For the 2026-27 FAFSA, this information is not reported if the business has less than 100 full-time employees.