

Early Aid Estimator 2020  
Preliminary Worksheet

Our financial aid estimator is designed to be completed in one session—you cannot save your work and return to it later—so we encourage you to use this worksheet to assemble the necessary information before you go online. **Please take time prior to submitting to consider if you plan to complete both the merit aid and need-based aid sections, or if you would like to receive a merit only estimate.**

In addition to routine questions like your address, telephone number, and email addresses, the merit scholarship section asks about your high school experience:

- senior year courses
- GPA and class rank
- Honors, AP, IB, and/or college courses from 9<sup>th</sup> grade on
- standardized test scores (optional)
- activities and leadership positions
- awards and honors you have received. *We know that your recent academic experiences may have been disrupted, so we understand that many of the academics and activities you have been involved with aren't happening in typical ways.*

The need-based aid section requests information about your family members—including dates of birth and whether any other family members will be enrolled in college for 2021-2022—and also about the family's finances, so having 2019 federal income tax returns on hand might prove helpful:

- 2019 income for yourself and your parents
  - adjusted gross income (line 8b of IRS 1040)
  - income from employment
- your 2019 federal income tax liability (line 14 of IRS 1040)
- untaxed income such as
  - child support received
  - pre-tax contributions into IRAs or 401k/403b retirement accounts and the like (Codes D, E, F, G, H, and S from boxes 12a through 12d on W-2 form)
  - tax-exempt interest/dividend or pension income
  - housing and living allowances for clergy and military
- estimates of your assets and your parents' assets as of late 2020 or early 2021 (when you file the FAFSA)
  - cash, savings, and checking accounts
  - stocks and bonds
  - real estate and other investments (but not your primary residence)
  - 529 educational savings plans
  - business/farm value (unless it is a small business or a family farm)