

# *FACTS Grant & Aid Application Worksheet*

## **2025-26**

Below is the information you will need to have ready to fill out your Grant & Aid application.

1. Applicant and Co-Applicant (if applicable):
  - Name and Contact Info
  - Social Security #, Date of Birth, Marital Status, Employment Status, Religious Affiliation
  
2. Student Information - names, birth dates, social security #s
  
3. Income Information - be prepared to answer information about how you file federal taxes, etc. This will ask if you own a business, farm, etc. You will also likely need to provide additional documentation with your income tax forms, if you do.
  
4. Non taxable income - Choose ways that you might receive nontaxable income, such as child support, VA Benefits, etc. Pop-up boxes will appear asking you to input the amount you receive and whether it is monthly, weekly, etc.
  
5. Monthly Expenses
  - Rent or Mortgage: \_\_\_\_\_ per month (include taxes and insurance)
  - Second Home? Yes or No If Yes, monthly payment: \_\_\_\_\_
  - Home Equity Loan Payments: \_\_\_\_\_ per month
  - Vehicles:  
Year \_\_\_\_\_ Make/Model \_\_\_\_\_ Payment \_\_\_\_\_  
Year \_\_\_\_\_ Make/Model \_\_\_\_\_ Payment \_\_\_\_\_
  - Credit card - Total Debt \_\_\_\_\_  
Total minimum payments per month \_\_\_\_\_
  - Student Loan monthly payments \_\_\_\_\_
  - Other loan debt

Creditor \_\_\_\_\_ Monthly payment \_\_\_\_\_

- Child support payments: \_\_\_\_\_ per month
- Health Insurance premiums payments \_\_\_\_\_ per month
- Vehicle insurance \_\_\_\_\_ annually
- Total Out-of-Pocket Medical Expenses for year \_\_\_\_\_
- Charitable Contributions (total for year) \_\_\_\_\_
- College Expenses (Expected contribution) \_\_\_\_\_
- Child care Expenses for the year \_\_\_\_\_
- Elder care expenses for the year \_\_\_\_\_

## 6. Assets/Liabilities

- Value of cash, savings, and checking accounts \_\_\_\_\_
- Value of stocks, bonds, mutual funds, or CDs \_\_\_\_\_
- Value of 529 plan accounts \_\_\_\_\_
- Expected 2024 contribution to 529 accounts \_\_\_\_\_
- Value of retirement plan assets \_\_\_\_\_
- Annual contribution to retirement plan assets \_\_\_\_\_
- Estimated Value of home \_\_\_\_\_
- Amount you owe for your home \_\_\_\_\_
- Estimated value of second home \_\_\_\_\_
- Amount you owe for second home \_\_\_\_\_

If your wages come from a "job," you will need to upload your income tax forms from 2023 and your W-2s from 2024. If you have a farm, business, partnership, S corporation, rental property, or estates and trusts, you will also need to upload specific forms that should be part of your income tax packets.

**\*\*For families who have businesses and partnerships, FACTS has recommended that you create an account on IRS.gov and request your return transcript from the appropriate year and then upload it to FACTS because it should have all of the information they need in one document without a bunch of scanning nonsense!!!**

If you need help uploading documents, please reach out to Mrs. Muhlenkamp or Mrs. Hawk.