

FACTS Grant & Aid Application Worksheet

2026-27

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 2024 and your W-2s from 2025. 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. I recommend uploading your entire packet.

*****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, Mrs. Luebke, or Mrs. Martens.