

CSS Profile Checklist

The CSS Profile is required by some colleges as listed on www.cssprofile.org. This form gives colleges an in-depth knowledge of you and your family's financial situation to help them determine how to distribute institutional aid to you.

Go here to begin: <https://cssprofile.collegeboard.org/>

College Board Username: _____ Password: _____

2020 FEDERAL TAX RETURNS, TAX RETURN SCHEDULES, AND W-2(S)* FOR STUDENT AND PARENTS(S)

*If no w-2(s) are available, bring in records of amount earned for student and parent(s)

PARENT INFO

	Parent 1	Parent 2 (If applicable)
Date of Birth	___/___/___	___/___/___
Job Title		
Place of Employment		
# of years working there		
Type of retirement account(s)		
Current value of retirement account(s)		
Will you receive social security upon retirement?		
Annual amount contributed to medical FSA		
Annual amount contributed to dependent care FSA		
Annual amount contributed to Health Savings Account		

*How much money will your custodial parent(s) contribute for college expenses for the upcoming year? \$ _____

INCOME AND BENEFITS

	Yes	No	Monthly Amount
Untaxed social security benefits (SSI, SSDI, untaxed social security retirement)			
Supplemental Nutrition Assistance Program (SNAP) or Food Stamps			
Women Infants and Children (WIC)			
Welfare benefits (TANF)			
Child support received			
Unemployment			
Veteran's benefits			
Worker's compensation			

*Do your parent(s) receive any money from elsewhere or have bills paid on their behalf? YES NO
 If yes, how much did they receive in 2020? \$ _____

PARENT(S) ASSETS

- ★ Amount in cash/checking/savings \$ _____
- ★ Value of investments (stocks, CDs, mutual funds, 529 plans, etc) \$ _____

PARENT(S) EXPENSES

	2020	2021
Annual child support paid	\$ _____	\$ _____
Annual amount paid on parent(s) current educational loans	\$ _____	\$ _____
Annual amount paid by parent(s) on sibling (s) educational loans	\$ _____	\$ _____
Annual medical/dental expenses not covered by insurance	\$ _____	\$ _____



HOUSING INFO

- ★ If you rent a home: Monthly rental payment: \$ _____
- ★ If you own a home: Monthly mortgage payment: \$ _____

★ If you own a home:

- Current market value: \$ _____
- Total amount owed: \$ _____
- Amount owed on primary mortgage: \$ _____
- Year purchased: _____
- Purchase price: \$ _____

★ If you own real estate that you do NOT live in:

- Current market value: \$ _____
- Total amount owed: \$ _____
- Amount owed on primary mortgage: \$ _____
- Year purchased: _____
- Purchase price: \$ _____

INFO ABOUT OTHERS IN HOUSEHOLD

Name	Relationship to student	Current school	Year in School	Grants/Scholarships received	Amount parents pay

INFO ABOUT FAMILY VEHICLES

★ If your family owns a car, please answer the following (For ALL Vehicles):

- Make: _____ ; _____
- Model: _____ ; _____
- Year: _____ ; _____
- Cost when purchased: _____ ; _____
- Date of purchase: _____ ; _____
- Amount still owed on car: _____ ; _____

Are there any special financial circumstances you would like the financial aid offices at your colleges to know about? (e.g. loss of job, disability, sending money to family in another country, the passing of a family member)

INFO ABOUT NONCUSTODIAL PARENT

If biological parents are living separately, please provide the following information about the parent you do NOT live with (if known)

- Name: _____
- Address: _____
- City/State/Zip: _____
- Occupation/Employer: _____

Year of separation or divorce: _____

Amount this parent will contribute to student's college education for 2022-2023: \$ _____

Is there an agreement specifying this parent will contribute to your postsecondary education: YES NO

**This parent may be required to fill out an additional CSS Profile application with their information.*