

Student Information

1. Name		
Last	First	MI
2. Phone Number ()		
E-mail		
3. Street Address		
City	State	Zip
4. Student's estimated 2010 taxable income	\$ _____ .00	6. Student's savings and other assets (See instructions for question 21 for a description of other assets.)
5. Student's estimated 2010 untaxed income & benefits (See instructions for question 18.)	\$ _____ .00	\$ _____ .00

Parental Information

7. What is your parents' current marital status? <input type="checkbox"/> Married/Remarried <input type="checkbox"/> Unmarried (Single, divorced, separated or widowed)		
8. Birthdate of older parent	_____	10. Number of family members in 2011-2012 (See instructions.)
9. Parents' state of legal residence. (Use two-letter US Post Office abbreviation.)	_____	11. Number of children in college in 2011-2012 (See instructions.)
12. For 2009, your parents filed a: (If your parents filed an IRS Form 1040 for 2009 but will be eligible to file a 1040A or 1040EZ for 2010, check the box for Form 1040A or 1040EZ.)	<input type="checkbox"/> Form 1040 <input type="checkbox"/> Form 1040A or 1040EZ <input type="checkbox"/> No tax return was filed. (Skip to question 17.)	18. See instructions for question 18.
13. 2009 total number of exemptions: Form 1040-line 6d, or 1040A-line 6d; 1040EZ filers, enter 1 if single, 2 if married.	_____	19. How much will your parents' 2010 income change (+ or -) from 2009? (See instructions.)
14. 2009 Adjusted Gross Income: Form 1040 - line 37, 1040A - line 21, or 1040EZ - line 4	\$ _____ .00	<i>For questions 20 through 22 below, use values as of today.</i>
15. 2009 Itemized deductions: Form 1040, line 40. Enter zero (0) if a Form 1040A or 1040EZ was filed.	\$ _____ .00	20. Cash, savings and checking accounts (Do not include lump sum pension funds.)
16. 2009 Income Tax Paid: Form 1040 - line 55, 1040A - line 37, or 1040EZ - line 11	\$ _____ .00	21. Real estate and investments (See instructions for question 21.)
17. 2009 income earned from work: (See instructions.)		22. Business or farm equity (Market value minus debt. Do not include a family farm if it is your principal residence and your parents participate in its operation or a family owned business with less than 100 employees)
Father/Stepfather (Do not leave blank)	\$ _____ .00	\$ _____ .00
Mother/Stepmother (Do not leave blank)	\$ _____ .00	23. If a Wisconsin resident, has either parent received a four-year college degree? <input type="checkbox"/> Yes <input type="checkbox"/> No

Do not leave any lines blank. Enter "0" when applicable or N/A if the question does not apply to you. An incomplete form will delay processing.

 Student Signature

 Parent/Stepparent Signature

 Date

Carroll University is pleased to provide you with the opportunity to receive an early estimate of your financial aid eligibility. We offer this service free to applicants because we know how important financial aid is to your decision regarding a Carroll education.

If you complete and return the Student Aid Estimator form on the back of this sheet, we will send you personalized results that include the costs to attend Carroll and an estimate of the amount of aid you may be eligible to receive. Furthermore, we will send you a guide that describes loan programs and payment plans available to you and your parents.

This Student Aid Estimator form is designed for U.S. citizens (or permanent residents) who are single students and are dependent on their parents for support. This form should be completed only by individuals who are considering attending Carroll on a full-time undergraduate basis during the 2011-12 academic year. We have made this form as brief and easy as possible. The official financial aid application (which will be available for you to complete after January 1, 2011) collects additional information with much more detailed instructions. If your financial circumstances are unusual or complicated, please contact us to find out how to complete this form and still receive a good estimate.

The Student Aid Estimator form is not an application for financial aid – it is an optional planning document. To apply for federal, state and Carroll University financial assistance, you must complete the Free Application for Federal Student Aid (FAFSA) by April 15, 2011. The 2011-2012 FAFSA will be available on January 1, 2011. You can complete this form at www.fafsa.gov.

Instructions

Divorced, Separated or Remarried Parents

The federal government has established detailed rules about whose resources must be reported in cases of divorce, legal separation and remarriage. In brief, students must report the marital status, income, assets, and other information of the parent who has custody plus that parent's current spouse (stepparent), if any. If you have questions about whose information to report, please call us for advice.

Parent Information

10. **Number of family members:** Enter the number of people your parents will support between July 1, 2011 and June 30, 2012. Include yourself, your parents, and other children who will get more than half of their support from your parents. If your parents support others, call us to see if they should be included.
11. **Number in college:** Of the children included in question 10, how many will be enrolled at least half-time in college degree or certificate programs between July 1, 2011 and June 30, 2012? Be sure to include yourself. If your parents are in college, do **not** include them.
17. **2009 Income earned from work:** If you answered questions 13 through 16, include amounts your parents earned from working in 2009 from your parents' 2009 Form 1040-line 7, 12, and 18; or 1040A-line 7; or 1040EZ-line 1. Report your father's/stepfather's and mother's/stepmother's earnings separately. (If you skipped questions 13 through 16, include your parents' earnings from work in 2009. Add up earnings from your parents' W-2 forms and other earnings from work that are not reported on W-2 forms.)
18. Include any tax-deferred IRA, Keogh, 401(k) and 403(b) plan payments made in 2009, **as reported on W-2 form Box 12a-12d, codes D, E, F, G, H & S**; 2009 nontaxable interest and dividends, child support, workers' compensation, etc. received in 2009.
NOTE: Include housing, food and other living allowances paid to members of the military, clergy and others.
19. **2010 Income change:** Your financial aid eligibility for 2011-2012 will be based on your parents' 2010 income. Write in the amount that your parents expect their income to increase or decrease between 2009 and 2010. Be sure to add a "+" for an expected increase or a "-" for an expected decrease.
21. **Real estate and investments:** Include real estate (other than your home), trust funds, money market funds, mutual funds, certificates of deposit, stocks, bonds, other securities, installment and land sale contracts, the value of prepaid tuition plans owned by the parents, etc., *minus* any debt that is related to these assets. Do not include the value of life insurance and retirement plans (pension funds, annuities, IRAs, Keogh plans) or the value of prepaid tuition plans owned by the student.

Please mail this form to:
Carroll University
Office of Admission
100 N. East Ave.
Waukesha, WI 53186

Please make a copy for your records.