

Please Print

Student Information		
1. Name		
Last	First	MI
2. Phone Number ()		E-mail
3. Street Address		
City	State	Zip
4. What is your current marital status? (Check unmarried if you are single, divorced, separated or widowed.)		6. Your state of legal residence. (Use two-letter US Post Office abbreviation.) _____
<input type="checkbox"/> Married <input type="checkbox"/> Unmarried		
5. Your date of birth (mm/dd/yy) _____		

7. Number of family members in 2011-2012 (See instructions.) _____	14. 2009 income earned from work (See instructions.): <table style="width: 100%;"> <tr> <td style="text-align: right;">Student (Do not leave blank)</td> <td style="text-align: right;">\$ _____ .00</td> </tr> <tr> <td style="text-align: right;">Spouse (Do not leave blank)</td> <td style="text-align: right;">\$ _____ .00</td> </tr> </table>	Student (Do not leave blank)	\$ _____ .00	Spouse (Do not leave blank)	\$ _____ .00
Student (Do not leave blank)	\$ _____ .00				
Spouse (Do not leave blank)	\$ _____ .00				
8. Number of college students in 2011-2012 (See instructions.) _____	15. <i>See instruction for question 15.</i> \$ _____ .00				
9. For 2009, you filed a: (If you 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.) <table style="width: 100%;"> <tr> <td><input type="checkbox"/> Form 1040</td> <td rowspan="3" style="vertical-align: top;"> 16. How much will your 2010 income change (+ or -) from 2009? (See instructions.) \$ _____ .00 </td> </tr> <tr> <td><input type="checkbox"/> Form 1040A or Form 1040EZ</td> </tr> <tr> <td><input type="checkbox"/> No tax return was filed. (Skip to question 16.)</td> </tr> </table>	<input type="checkbox"/> Form 1040	16. How much will your 2010 income change (+ or -) from 2009? (See instructions.) \$ _____ .00	<input type="checkbox"/> Form 1040A or Form 1040EZ	<input type="checkbox"/> No tax return was filed. (Skip to question 16.)	17. Cash, savings and checking accounts (Do not include lump sum pension funds.) \$ _____ .00
<input type="checkbox"/> Form 1040	16. How much will your 2010 income change (+ or -) from 2009? (See instructions.) \$ _____ .00				
<input type="checkbox"/> Form 1040A or Form 1040EZ					
<input type="checkbox"/> No tax return was filed. (Skip to question 16.)					
10. 2009 total number of exemptions: Form 1040-line 6d, or 1040A-line 6d; 1040EZ filers, enter 1 if single, 2 if married. _____	18. Real estate and investments (Market value minus debt. See instructions for question 18.) \$ _____ .00				
11. 2009 Adjusted Gross Income: Form 1040 – line 37, 1040A - line 21, or 1040EZ - line 4 \$ _____ .00	19. Business or farm equity (Market value minus debt. Do not include a family farm if it is your principal residence and you materially participate in its operation or a family owned business with less than 100 employees.) \$ _____ .00				
12. 2009 Itemized deductions: Form 1040, line 40. Enter zero (0) if a Form 1040A or 1040EZ was filed. \$ _____ .00					
13. 2009 Income Tax Paid: Form 1040 - line 55, 1040A - line 37, or 1040EZ - line 11 \$ _____ .00					

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

Spouse 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 will 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.

This Student Aid Estimator is designed for U.S. citizens (or permanent residents) who are independent of their parents for support and considering attending Carroll on a full-time undergraduate basis during the 2011-2012 academic year. According to federal regulations, you are independent if you can answer "yes" to one or more of the following statements. Please indicate which statements apply to you.

- Yes You were born before January 1, 1988.
- Yes You are an active-duty member or veteran of the U.S. Armed Forces.
- Yes You will be a graduate or professional student in 2011-2012.
- Yes You are married.
- Yes Both your parents are deceased, you are an emancipated minor, you are in legal guardianship or after your 13th birthday you were in foster care, a ward of the court or legally adopted.
- Yes You have legal dependents (other than a spouse).

If you do not meet any of these criteria or have questions about them, please call us for more information.

The information on this form will be used to estimate your eligibility for student financial aid for the 2011-2012 school 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 Widowed Students

If you are married, include information about yourself and your spouse. If you are divorced, legally separated or widowed, do not include information about your spouse.

Family Information

7. **Number of family members:** Enter the number of people you will support between July 1, 2011 and June 30, 2012. Include yourself, your spouse, and children who will get more than half of their support from you. If you support others, call us to see if they should be included.
8. **Number in college:** Of the people included in question 7, 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.
14. **2009 Income earned from work:** If you answered questions 10 through 13, include amounts you and your spouse earned from working in 2009 from your 2009 Form 1040-lines 7, 12, and 18; or Form 1040A-line 7; or Form 1040EZ-line 1. Report you and your spouse's earnings separately. (If you skipped questions 10 through 13, include you and your spouse's earnings from work in 2009. Add up earnings from your and your spouse's W-2 forms and other earnings from work that are not reported on W-2 forms.)
15. 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 2008.
16. **2010 Income change:** Your financial aid eligibility for 2011-2012 will be based on your 2010 income. Write in the amount that you expect your and your spouse's income to increase or decrease between 2009 and 2010. Be sure to add a "+" for an expected increase or a "-" for an expected decrease.
18. **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, 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).

**Please mail this form to: Carroll University, Office of Admission, 100 N. East Ave., Waukesha, WI 53186
(262) 524-7220 ♦ 1-800-CARROLL (1-800-227-7655) ♦ FAX (262) 951-3037**

Please make a copy for your records.