

## FAST Aid Worksheet

For your convenience, we have included a worksheet for you to use when gathering the necessary information that will be asked on the FAST application. If you are unsure what is required for a particular field, there is a Glossary available at the end of this book.

### Application Information – Student

(Fill out 101-107 for each student)

**101** Name \_\_\_\_\_  
**102** Birth Date \_\_\_\_\_  
**103** Gender \_\_\_\_\_  
**104** Grade Entering \_\_\_\_\_  
**105** 529 Savings \_\_\_\_\_  
**106** Social Security Income \_\_\_\_\_  
**107** Child Trust \_\_\_\_\_

### Parent/Guardian

(Fill out 201-212 for each parent in the household.)

**201** Name \_\_\_\_\_  
**202** Gender \_\_\_\_\_  
**203** Birth Date \_\_\_\_\_  
**204** Address 1 \_\_\_\_\_  
**205** Address 2 \_\_\_\_\_  
**206** City \_\_\_\_\_  
**207** State, ZIP \_\_\_\_\_  
**208** Country \_\_\_\_\_  
**209** Phone (Home, Cell, or Work) \_\_\_\_\_  
**210** Occupation \_\_\_\_\_  
**211** Employer \_\_\_\_\_  
**212** Disabled? \_\_\_\_\_

### Parent/Guardian

(Fill out 201-212 for each parent in the household.)

**301** Name \_\_\_\_\_  
**302** Birth Date \_\_\_\_\_  
**303** Gender \_\_\_\_\_  
**304** Present Grade \_\_\_\_\_  
**305** Present School \_\_\_\_\_  
**306** Is there tuition? How much? \_\_\_\_\_  
**307** Do you receive aid or scholarship? \_\_\_\_\_  
**308** Does this dependent live at the same address as applicant(s)? \_\_\_\_\_

### Application Information – Student

(Fill out 350-352 for each adult dependent.)

**350** Name \_\_\_\_\_  
**351** Birth Date \_\_\_\_\_  
**352** Does this dependent live at the same address as applicant(s)? \_\_\_\_\_

### Real Estate

(Fill out 401-411 for each property.)

**401** Mortgage Payment (monthly) \_\_\_\_\_  
**402** Mortgage Interest Paid (annual) \_\_\_\_\_  
**403** Is your home owners insurance included in your mortgage? \_\_\_\_\_  
**404** Original Mortgage Value \_\_\_\_\_  
**406** Year Purchased \_\_\_\_\_  
**407** Purchase Price \_\_\_\_\_  
**408** Present Market Value \_\_\_\_\_  
**409** Have you refinanced? What year? Refinance amount \_\_\_\_\_  
**410** Principal Remaining \_\_\_\_\_  
**411** Property Tax Paid \_\_\_\_\_  
**412** Is your property tax included in your mortgage? \_\_\_\_\_

### Vehicle

(Fill out 450-454 for each vehicle.)

**450** Make/Model \_\_\_\_\_  
**451** Year \_\_\_\_\_  
**452** Estimated Value \_\_\_\_\_  
**453** Debt Outstanding \_\_\_\_\_  
**454** Payment (Monthly) \_\_\_\_\_



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## Assets

- 504 Savings \_\_\_\_\_
- 505 Checking \_\_\_\_\_
- 506 Certificates of Deposit \_\_\_\_\_
- 507 Stocks, Bonds, Securities, etc. \_\_\_\_\_
- 508 Trusts & Inheritance \_\_\_\_\_
- 509 Retirement Savings \_\_\_\_\_
- 510 Business Assets \_\_\_\_\_
- 511 Other Assets \_\_\_\_\_
- 512 Further Asset Explanation (optional) \_\_\_\_\_

## Liabilities

- 553 Personal Loans \_\_\_\_\_
- 554 Credit Cards \_\_\_\_\_
- 555 Equity Loans \_\_\_\_\_
- 556 Equity Interest Paid \_\_\_\_\_
- 557 Other Liabilities \_\_\_\_\_
- 558 Further Liabilities Explanation (optional) \_\_\_\_\_

## Income

- 601 W2 Income Adult 1 \_\_\_\_\_
- 601b W2 Income Adult 2 \_\_\_\_\_
- 602 Business Income \_\_\_\_\_
- 603 Dividend/Interest Income \_\_\_\_\_
- 604 Capital Gains Income \_\_\_\_\_
- 605 Real Estate Income \_\_\_\_\_
- 606 Trust, Inheritance Income \_\_\_\_\_
- 607 Alimony Income \_\_\_\_\_
- 608 Child Support Received \_\_\_\_\_
- 609 Gifts \_\_\_\_\_
- 610 All Other Income \_\_\_\_\_
- 611 Further Income Explanation (optional) \_\_\_\_\_

## Expenses

- 704 Rent \_\_\_\_\_
- 705 Homeowners Insurance \_\_\_\_\_
- 706 Life Insurance \_\_\_\_\_
- 707 Auto Insurance \_\_\_\_\_
- 708 Health Insurance \_\_\_\_\_
- 709 Electricity \_\_\_\_\_
- 710 Heating \_\_\_\_\_
- 711 All Other Utilities/Phone \_\_\_\_\_
- 712 Child Support Paid \_\_\_\_\_
- 713 Alimony Paid \_\_\_\_\_
- 714 Charity/Tithing \_\_\_\_\_
- 715 Federal Taxes \_\_\_\_\_
- 716 State/County/City Taxes \_\_\_\_\_
- 717 Medical Expenses \_\_\_\_\_
- 718 Other Loan Expenses \_\_\_\_\_
- 719 Support of Dependents \_\_\_\_\_
- 720 Childcare Expenses \_\_\_\_\_
- 721 Other Expenses \_\_\_\_\_
- 722 Do you expect to pay the Alternative Minimum Tax?  
\_\_\_\_\_
- 723 Further Expenses Explanation (optional) \_\_\_\_\_



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## Help Bubbles

Each numerical field below has a Help Bubble associated with it to help you understand what information is being asked to enter. The following is a summary of the online Help Bubbles by line number.

(Not all lines require a help bubble.)

### 105 529 Savings

Enter the total amount of all money in all 529 College Savings Plans for the applicant.

### 106 Social Security Income

Enter the total amount this student receives annually in benefits from the Social Security Administration.

### 107 Child

Trust If a trust is held in this child's name, please enter the amount and explain in detail below in the box provided. If a trust is held in this child's name, please enter the amount in the field provided. Please be sure to include any Uniform Transfers to Minors Act (UTMA) or Uniform Gifts to Minors Act (UGMA) accounts.

### 401 Mortgage Payment

Enter the amount of your monthly mortgage payment. Please refer to your most recent mortgage statement for the amount.

### 402 Mortgage Interest Paid

Enter the amount of interest you paid on your mortgage in the last year. If this is not available on your mortgage statement, please call your mortgage holder to get this amount.

### 403 Is your homeowners insurance included in your mortgage?

Select Yes or No.

### 404 Original Market Value

When you first bought this house, how much did you mortgage?

### 406 Year Purchased

Enter the year you originally purchased this house.

### 407 Purchase Price

For how much did you originally purchase this house?

### 408 Present Market Value

What is the present market value of your home?

### 409 Have you refinanced?

Check yes or no. What year did you refinance your house? How much did you refinance?

### 410 Principal Remaining

What is the unpaid balance on your mortgage?

### 411 Property Tax Paid

What is your annual property tax bill due from city, county, and/or state?

### 450 Make/Model

Enter the brand and identifying name of your vehicle. Example: Ford Focus, Dodge Neon

### 451 Year

Enter the year that the vehicle was manufactured for sale.

### 452 Estimated Value

Enter the present market value of your vehicle if sold in the current condition. If you are unsure of the value, click the blue link to look it up at Kelley Blue Book. There is an online link that will direct you to KBB.

### 453 Debt Outstanding

Enter the total amount remaining on the original vehicle loan. If you lease this car, enter "0".

### 454 Payment

Enter the amount that you pay each month for a loan or lease on this vehicle.

### 501 Home Market Value

This section auto-fills depending on what was entered in Family Home Information Section.

### 502 Other Real Estate Market Value

This section auto-fills depending on what was entered in Family Home Information Section.

### 503 Vehicle(s) Market Value

This section auto-fills depending on what was entered in Family Home Information Section.

### 504 Savings

Enter the total amounts of all your savings accounts and money market accounts. Use information from statements for the last full month.



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**505 Checking**

Enter the total amounts of all your checking accounts. Use information from bank statements for the last full month.

**506 Certificate of Deposit**

If you own Certificates of Deposit, please indicate the amounts here. To get current amounts, call your bank of the issuer of the CD and request totals for the last full quarter or month.

**507 Stocks, Bonds, Securities, etc.**

Enter the amounts as of your last quarterly statement of all stocks, bonds, and other securities. Do not include any IRA or Keough accounts. Do your best to establish the value as of the last full quarter, or last month.

**508 Trust and Inheritance**

Enter the total amount of money held in trust for you and any dependent children who are not applying as students. Also include any inheritance received within the last year.

**509 Retirement Savings**

Enter the total amounts of all K, IRA, Roth IRA, and Keough accounts as of the most recent statements.

**510 Business Assets**

If you own a business, indicate your business assets as of your last monthly report. If you do not own a business, enter a zero.

**511 Other Assets**

Enter the total valuation of your tangible assets. Do not include your house or automobiles. Items that might be included here are valuable pieces of jewelry, art work, antiques, coin collections, boats, airplanes, furs, and anything that is worth \$1,000 or more.

**512 Further Asset Description**

Use this space to clarify any of your answers in the Asset Section.

**550 Home Principal**

This section auto-fills depending on what you entered in the Family Home Information Section.

**551 Other Real Estate**

This section auto-fills depending on what you entered in the Family Home Information Section.

**552 Vehicle Outstanding Debt**

This section auto-fills depending on what you entered in the Family Home Information Section.

**553 Personal Loans**

Enter any secured or unsecured loans you may have received from financial institutions, businesses, or persons. The number should be the actual amount owed to date, not the amount borrowed. Do not include credit card balances or equity loans in this category.

**554 Credit Cards**

Enter the total amount owed on all credit cards—both those issued by banks and those issued by businesses.

**555 Equity Loans**

Enter the total of any money that you have borrowed above the mortgage with your house as a security

**556 Equity Interest**

Enter the total of all interest paid annually on the equity loans listed in line 555 above.

**557 Other Liabilities**

Enter the total amount you owe for items such as court judgments, delinquent taxes, or any other liability that you might have that was not covered in the previous questions.

**558 Further Liability Explanation**

Use this space to clarify any of your answers in the Liability section.

**601 W2 Income**

Enter your total gross W2 wages (before any deductions) from all W2s you received for the year. If you cannot find “Gross Wages/Pay” on your W2, please enter the amount shown in Box 5 or Box 1 (whichever is higher). Your section 125 deductions will be accounted for elsewhere. If you did not receive W2 wages from an employer, please enter zero. If you are not sure, please refer to your Federal 1040 form to see if you have any income reported there for W2 wages.

**602 Business Income**

Enter the total amount of income reported on your Federal 1040 tax form as a result of owning a business. If there was no income, enter a zero. You may not enter a negative number. This income is typically reflected on Schedule 1 of the Federal 1040 tax form and is supported by Schedules C, E or F.



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### 603 Dividend/Interest Income

Enter the total amount of all income received from dividend and interest bearing accounts as reported on your 1099 tax form(s). This should include interest received from savings accounts, money market accounts, etc. You should also include the total amount of bond coupons redeemed during the tax year. If not applicable, enter zero.

### 604 Capital Gains Income

Enter the total amount of capital gains earned as reported on your federal tax return. Typically, this amount is reflected on Schedule D of your federal tax return. If you did not earn capital gains, please enter zero.

### 605 Real Estate Income

Please enter the total amount of all monies received from real estate currently owned. Examples include rental properties, vacation homes, and time shares.

### 606 Trusts

Enter the amount received annually, as listed in your K-1 Schedule, from any trusts for which you or your child is a beneficiary. In the "Optional further income explanation" box in line 610, describe the trust and who created the trust, the intended purpose, as well as any restrictions/requirements as to use.

### 607 Alimony Income

Enter the total amount of alimony received during the last year. If not applicable, enter zero.

### 608 Child Support Received

Enter the total amount of Child Support received during the last year. If not applicable, enter zero.

### 609 Gifts

Enter the total of any gifts you have received, such as a gift from a grandparent or any other relative. If not applicable, enter zero.

### 610 All Other Income

Enter the total amount of any income not already listed including money received from part time jobs for which a W-2 is not given, social security payments, disability benefits, retirement income, unemployment income, in addition to any other income as reported on a 1099 form and/or pay from moonlighting jobs. Also include earnings received from hobbies, court awards, gambling winning, etc.. If not applicable, enter zero.

### 701 Home Mortgage Payment

This section auto-fills depending on what you entered in the Family Home Information Section (it becomes an annual number).

### 702 Other Mortgage Payments

This section auto-fills depending on what you entered in the Family Home Information Section.

### 703 Vehicle Payments

This section auto-fills depending on what you entered in the Vehicle Information Section.

### 704 Rent

Enter the yearly amount of rent you pay for your home or apartment. If you do not pay rent, enter a zero in this space. If not applicable, enter zero.

### 705 Home Owner Insurance

If you own a home and your home insurance is not included in your mortgage, enter the amount that you pay annually here. Please note: Do not enter Renters Insurance in this field, please enter that cost in Other Expenses.

### 706 Life Insurance

Please enter the total of the annual premiums you pay for life insurance. If not applicable, enter zero.

### 707 Auto Insurance

Please enter the total of the annual premiums you pay for auto insurance. If not applicable, enter zero.

### 708 Health Insurance

Enter the amount that you pay annually for Health Insurance premiums. Include any supplemental policies in addition to your primary policy. Do not include any portion of the premium that your employer covers, and do not include out-of-pocket costs for co-pays or other medical costs, as they should be reported in Medical Expenses. If not applicable, enter zero.

### 709 Electricity

Enter the amount that you pay annually for electricity. If you do not have this number, contact your service provider. This number should only reflect costs associated with your primary residence. If you pay rent, and electricity is included in the rental amount, or if this question is not applicable, enter zero.



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### 710 Heating

If your heating costs are not included in your electric payments, enter the amount you pay annually to heat your residence. If your heating costs are included in your electric bill, please place a zero in this space. This number should only reflect costs associated with your primary residence. If you pay rent, and heating is included in the rental amount, or if this question is not applicable, enter zero.

### 711 All Other Utilities/Phone

Please enter the sum of everything you spend annually for land line or Internet phone service, Internet services, cell phones, water, garbage, and sewer. This number should only reflect costs associated with your primary residence.

### 712 Child Support Paid

Please enter the total annual amount of child support payments you are required to pay annually. If not applicable, enter zero.

### 713 Alimony Paid

Please enter the total annual amount of alimony you are required to make. If not applicable, enter zero.

### 714 Charity/Tithing

Please enter the total amount of all monetary charitable and/or tithing donations that you made for the prior calendar year to organizations recognized as charities by the IRS. If not applicable, enter zero.

### 715 Federal Taxes

If you have already filed your federal income tax, please enter your total tax which can be found on line 24 of your Federal Form 1040. If you have not yet filed your taxes, please check the box, "I have not filed my taxes."

### 716 State/County/City Taxes

If you have already filed your state, county, and/or city taxes, please enter your total tax. If you have not yet filed your taxes, check the box, "I have not filed my taxes."

### 717 Medical Expenses

Enter the total amount of all medical expenses that you paid in the prior calendar year. This may include copays, prescriptions, physical exams, glasses, physical or psychological therapy, prosthetics, etc. Do not include any expenses that are covered by insurance. In the space provided, explain what you have included in this number.

### 718 Other Loan Expenses

Enter the annual amount of any other loan expenses you incur during the year. These may include credit card payments, personal loans, and bank loans that do not use your home equity as collateral. Do not include car payments, your mortgage or any other loans against equity in this field. In the space provided below, explain what you have included in this number.

### 719 Support of Dependents

Enter the annual amount you pay to support any adult dependents in your home. In the space provided below, please explain what you have included in this number.

### 720 Child Care Expenses

List your child care expenses. This might include child care, after school programs, camps, lessons, special needs, etc. In the space provided below, explain what you have included in this number.

### 721 Other Expenses

Enter the annual amount of any other expenses you incur during the year. These might include condo expenses, neighborhood dues, club memberships, etc. In the space provided below, explain what you have included in this number. Do not include car payments, house payments, or credit card payments. Do not include the expenses for food, clothes, or transportation.

### 722 Optional Further Expense Explanation

Use this space to clarify any of your answers in the Expense section.



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