

Parents' Financial Statement

2011-2012

Four Steps to Completing Your Parents' Financial Statement

Completing the Parents' Financial Statement (PFS) fully and accurately is a key part of your financial aid application. Please follow these tips below.



1. Gather materials you'll need to refer to as you complete the Parents' Financial Statement.

Gather your PFS Instruction Booklet and your W2 and 1040 tax forms.



2. Complete the PFS fully. Here are a few key tips:

- Parent and applicant names: Enter names *exactly* as they appear on tax returns and other official documents.
- Include your e-mail address and phone number in Section A so we can reach you if necessary.
- Fill in the school selections completely in Section B. Failure to list the complete school code, name, and state will result in delays. Looking for the SSS code for a school? See the Instruction Booklet or go to sss.nais.org/go/ssscore.



3. Sign your PFS and provide nonrefundable payment.

If a school has given you a Fee Waiver Code, enter that 8-character code in the Payment section. If you pay by check, write Parent A's first and last name on the check.



4. Mail your PFS to School and Student Services.

Using the PFS envelope in the Instruction Booklet, mail the PFS to:
School and Student Services
PO Box 449
Randolph, MA 02368-0449

For overnight mail, use this address: School and Student Services,
437 Turnpike Street, Canton, MA 02021.




Have you been instructed by schools to send additional required documents to SSS?

Many schools require that you submit documents in addition to your Parents' Financial Statement (such as your W-2 and/or 1040 tax return forms). If the school(s) to which you are applying has instructed you to send additional documents to SSS, you may send them either with the PFS or separately, using one of the envelopes provided in the Instruction Booklet. Enclose a Required Documents Cover Sheet (on the back side of this page) so that we can identify and process your documents. Indicate on the cover sheet which documents you are enclosing.

Why complete your PFS online?

It's the fastest, most accurate way to deliver your information to schools. And it'll save you \$12. Apply online at sss.nais.org.

 *If you entered answers for any items marked with a note icon (📝), provide explanation in Section F: Notes. Many schools require this explanation in order to make their financial aid decisions.*

Don't forget the deadlines!

Mail items at least 10 days before the school deadline to leave time for mail delivery and for processing time.

Go online to sss.nais.org!

View your Family Report and see whether the documents you mailed have been received and processed.



Required Documents Cover Sheet

If the school(s) to which you are applying has instructed you to send additional documents to SSS, you may send them either with the PFS or separately, using one of the envelopes provided in the Instruction Booklet.

1. Fill out this cover sheet.
2. Gather one copy (not an original) of each document you have been instructed to send to SSS. Do not use paper-clips or staple the documents. For documents smaller than 8 1/2" x 11" (e.g., some W2s), copy these documents onto a full size sheet of paper, or tape each one to a full size sheet of paper.
3. In the top margin of each document, write the telephone number you used on the PFS. If any document does not have the name of Parent A, Parent B, or one of the student applicants, write Parent A's name at the top of the document.
4. Enclose this cover sheet and the documents in one of the envelopes provided in the Instruction Booklet.
5. Mail the envelope at least 10 days before your school's deadline to allow for mail delivery and processing time.

Mail to:

School and Student Services
PO Box 449
Randolph, MA 02368-0449

For overnight mail, use this address: School and Student Services, 437 Turnpike Street, Canton, MA 02021.

Your PFS Identification Number: _____

If you submitted your PFS at an earlier date and you provided an e-mail address, you should have received e-mail confirmation that included a PFS ID number. It's okay to leave this line blank if you do not know your PFS ID number.

Your Household Information

Complete this section fully so we may match your documents to your application.
Enter name **exactly** as it appears on tax/official forms.

Parent/Guardian A

First Name _____ Last Name _____

Address _____ Suite/Apt. No. _____

City _____ State/Province _____ Zip/Postal Code _____

Country _____ Date of Birth *mmddyy* _____

Email _____ Phone _____

Parent/Guardian B

First Name _____ Last Name _____

Address _____ Suite/Apt. No. _____

City _____ State/Province _____ Zip/Postal Code _____

Country _____ Date of Birth *mmddyy* _____

Email _____ Phone _____

Your Enclosed Documents

Indicate which documents you are enclosing.
Enclose the documents you have been instructed by schools to send to SSS.

- | | |
|---|--|
| <input type="checkbox"/> Parents' Financial Statement | <input type="checkbox"/> Schedule C |
| <input type="checkbox"/> 2009 1040, 1040A or 1040EZ | <input type="checkbox"/> 1099 Form |
| <input type="checkbox"/> 2010 1040, 1040A or 1040EZ | <input type="checkbox"/> SSS Business/Farm Statement (<i>This is an SSS form.</i>) |
| <input type="checkbox"/> 2009 W2 Form | <input type="checkbox"/> Other Form _____ |
| <input type="checkbox"/> 2010 W2 Form | |





A

Household Information

Enter names exactly as they appear on tax/official forms. Questions marked with an asterisk (*) are CRITICAL - Your PFS cannot be accepted without these filled in. Questions marked with a note (📄) require explanation in Section F: Notes.

Parent/Guardian A

1 **First name*** _____ MI _____ **Last name*** _____ *Enter suffix at end of last name, leaving one blank space.*

Address _____ Suite/Apt. No. _____

City _____ State/Province _____ **Zip/Postal Code*** _____

Country _____ **Date of Birth* mmdyy** _____ Gender M F

Email _____ *Parent/Guardian A will be our primary contact for correspondence.*

Phone _____ Home Work Cell *Please provide phone and email address should we need to contact you. SSS is not responsible for any communication delays caused by the absence of a contact number or email address.*

Employer _____ Years with employer _____

Occupation _____ 📄 *If Parent/Guardian has more than one job, explain in Section F: Notes.*

Parent/Guardian B

1 **First name*** _____ MI _____ **Last name*** _____ *Enter suffix at end of last name, leaving one blank space.*

Address same as Parent/Guardian A Address _____

Suite/Apt. No. _____ City _____

State/Province _____ **Zip/Postal Code*** _____ Country _____

Email _____ **Date of Birth* mmdyy** _____ Gender M F

Phone _____ Home Work Cell *Please provide phone and email address should we need to contact you.*

Employer _____ Years with employer _____

Occupation _____ 📄 *If Parent/Guardian has more than one job, explain in Section F: Notes.*

2 If the applicant(s) has another living biological parent not listed in Question 1, indicate the relationship between the parents.

Never married Divorced Separated, no court action Legally separated Is there a joint custody agreement? Yes No Year of divorce/separation _____

Other parent's first name _____ Last name _____ MI _____

Address _____

City _____ State/Province _____ Zip/Postal Code _____

B

Student Applicant Information

Complete this section for each child applying to an SSS subscriber school(s). See SSS code list in the Instruction Booklet. For more than 3 schools, complete the Additional School Request form in the Instruction Booklet or at sss.nais.org/go/additionalschoolrequest.

Applicant A

3 **First name*** _____ MI _____ **Last name*** _____ Gender M F

Date of birth* mmdyy _____

Grade applicant will enter in Sept. 2011 _____

4 Applicant lives with: (select one)

Parent/Guardian A and B Parent/Guardian A

Parent/Guardian B Other 📄

5 SSS Code*	School(s) applicant is applying to: (Enter full school name—do not abbreviate.)*	State*	<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day

Applicant B

3 **First name*** _____ MI _____ **Last name*** _____ Gender M F

Date of birth* mmdyy _____

Grade applicant will enter in Sept. 2011 _____

4 Applicant lives with: (select one)

Parent/Guardian A and B Parent/Guardian A

Parent/Guardian B Other 📄

5 SSS Code*	School(s) applicant is applying to: (Enter full school name—do not abbreviate.)*	State*	<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day

Applicant C

3 **First name*** _____ MI _____ **Last name*** _____ Gender M F

Date of birth* mmdyy _____

Grade applicant will enter in Sept. 2011 _____

4 Applicant lives with: (select one)

Parent/Guardian A and B Parent/Guardian A

Parent/Guardian B Other 📄

5 SSS Code*	School(s) applicant is applying to: (Enter full school name—do not abbreviate.)*	State*	<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day
			<input type="checkbox"/> Boarding <input type="checkbox"/> Day

6 Basic Tax Information

- 6A Have you completed your 2010 Tax Return?
6B Income tax filing status for 2010:
6C How many federal income tax exemptions did you or will you claim for 2010?
6D What did you or will you report as your total itemized deductions from IRS Schedule A?
6E Total Federal Tax Paid (IRS 1040 or 1040A).

7 Total Taxable Income

Table with 3 columns: Description, 2010, Estimated 2011. Rows include Salaries and wages for Parent/Guardian A and B, Taxable dividends, Alimony, Other taxable income, etc.

Business and/or Farm Details Complete this section only if you own a business and/or farm. (See Instruction Booklet.)

- 7I Net profit/loss from business and/or farm
7J Owner of the business and/or farm:
7K Type of business and/or farm:
7L Percentage of ownership
7M Business/Farm Assets
7N Business/Farm Debts
7O Total depreciation claimed
7P Self-employment tax paid

8 Total Nontaxable Income

Table with 3 columns: Description, 2010, Estimated 2011. Rows include Child support received, Social security benefits, Other nontaxable income.

Worksheet—other nontaxable income breakdown/detail.

Worksheet table with 3 columns: Description, 2010, Estimated 2011. Rows include Payment to tax-deferred pension, Pretax contribution, Cash support, Housing allowances, etc.

9 Applicant Income and Assets

Table with 4 columns: Description, Applicant A, Applicant B, Applicant C. Rows include Student applicant earnings for 2010 and 2011, Did/will the student applicant file a federal tax return for 2010?, Student applicant assets.

