



Early Aid Estimator 2024 - Preliminary Worksheet

Please take time prior to submitting to consider if you plan to complete both the merit aid and need-based aid sections, or if you would like to receive a merit-only estimate.

Our financial aid estimator is designed to be completed in one session—you cannot save your work and return to it later—so we encourage you to use this worksheet to assemble the necessary information before you go online. You have the option for one of the following:

- **Merit aid AND need-based aid estimator** – Submitting both sections will allow us to estimate both your merit and potential need-based aid.
- **Merit-ONLY estimator** – Submitting only this section will allow us to estimate your merit aid

Merit aid section: In addition to routine questions like your address, telephone number, and email addresses, the merit aid section asks about your high school experience:

- senior year courses
- GPA and class rank (option to upload an unofficial transcript/report card or enter manually)
- honors, AP, IB, and/or college courses from 9th grade on
- activities and leadership positions (option to upload an activities resume or enter manually)
- awards and honors you have received.

Need-based section: The need-based aid section requests family member information – including birth dates and information about the family’s finances, so having 2023 federal income tax returns on hand might prove helpful:

- 2023 income for yourself and your parents
 - adjusted gross income (line 11 of IRS 1040)
 - income from employment
 - other income sources (Add together: 1040 Line 2a; 1040 Line 4a-4b, excluding rollover amount; 1040 Schedule 1 Line 8d; and 1040 Schedule 1 Line 16+20)
- 2023 federal income tax liability (line 24 of IRS 1040)
- annual child support received/will receive in 2024
- estimates of your assets and your parents’ assets as of late 2024 or early 2025 (when you file the FAFSA)
 - cash, savings, and checking accounts
 - stocks and bonds
 - real estate and other investments (but not your primary residence)
 - 529 educational savings plans
 - business/farm value
 - NOTE – do not include retirement plans in your investment values

We are looking forward to receiving your Early Aid Estimator!