



## Financial Aid Questionnaire (FAQ) for Educational Grants Due March 25, 2020

Applicant Name: \_\_\_\_\_ Chapter: \_\_\_\_\_

Email address: \_\_\_\_\_

### Financial Analysis Questionnaire (FAQ)

*If you are a Canadian citizen, citizen of some other country, or unable to complete the FAFSA then complete this form.*

### Federal Student Aid (FAFSA)

*If you are a US citizen complete the Free Application for Federal Student Aid (FAFSA) for 2020-2021. For those using the FAFSA, please submit the Student Aid Report (SAR) you receive after your FAFSA is processed.*

**This form should only be filled out if you are unable to complete a FAFSA.**

### What is the FAQ?

This Financial Analysis Questionnaire (FAQ) has been specifically developed for the Phi Sigma Sigma Educational Grants Program. The information reported is reviewed by a private financial aid consultant, who is in no other way connected to the Phi Sigma Sigma Foundation or Fraternity. An evaluation of need is given to the Scholarship Committee of Phi Sigma Sigma Foundation. The information received by the committee is confidential and is utilized solely for the purpose of determining issuance of a grant.

### Who fills out the FAQ?

This questionnaire should be filed on behalf of Phi Sigma Sigma members applying for a Foundation Educational Grant only. The Student Statement (Parts I, II, and III) of the FAQ should be completed by the student who is applying for the grant. If the answer to Number 6, 7, or 8 in Part I, Student Statement, is affirmative, a parent must also fill out the Parent Statement (Parts IV and V) of the FAQ. \* If the answers to Numbers 6, 7 and 8 are all negative, only the Student Statement of the FAQ need be filled out (student is considered independent).

\* If a student's parents are separated or divorced, information should be provided by the parent who has custody for the greatest portion of the 12 month calendar year. If the parents are divorced, or if the parent is widowed and the parent has remarried, the student's step parent should be considered as parent in filing the application.

### Accuracy of Information:

For the accurate assessment of the grant award, as well as for respect and fairness to other candidates applying for grants, it is important that the information provided be truthful and complete. Failure to comply in this area may jeopardize the awarding of a grant. In order to insure accuracy of reported information, an official copy of the parents' and student's 2018 U.S. income tax return from the Internal Revenue Service must be attached.

### Filing the FAQ:

Each application must be signed by the applicant and the parent who has filled out the Parent Statement (when applicable) and it must also be **stamped and signed by a notary public in two places** - at the **bottom of pages 4 and 6**.

The FAQ must be sent to Phi Sigma Sigma Foundation, Attn: Foundation Scholarship Committee  
8178 Lark Brown Road, Suite 202, Road Elkridge Maryland 21075,  
and must be postmarked by midnight March 25, 2019.

## Student Statement PART I – General Information

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1. \_\_\_\_\_  
Name of Student

2. \_\_\_\_\_  
Student's Permanent Mailing Address (include ZIP)

3. \_\_\_\_\_ ( ) \_\_\_\_\_  
Student's e-mail Home Phone Number

4. \_\_\_\_\_ ( ) \_\_\_\_\_  
Chapter School Phone Number

5. Student's year in college 2020-2021  
Second \_\_\_\_\_ Third \_\_\_\_\_ Fourth \_\_\_\_\_ Fifth \_\_\_\_\_ Graduate/Professional \_\_\_\_\_

6. Has the student been enrolled full-time for the 2019-2020 academic year? \_\_\_\_\_ Yes \_\_\_\_\_ No

7. Did (or will) the student live with parents for more than 6 weeks during calendar years:  
2019 ( ) 2020 ( )

8. Did (or will) the parents claim student as a U.S. income tax exemption for:  
2019 ( ) 2020 ( )

9. Did (or will) the student receive assistance worth more than \$750 from parents during calendar years:  
2019 ( ) 2020 ( )

10. Present marital status: \_\_\_\_\_ Single \_\_\_\_\_ Married \_\_\_\_\_ Separated \_\_\_\_\_ Divorced

11. Anticipated date of marriage: \_\_\_\_\_  
month/year

12. Number of children:  
Number of the student's children in college: \_\_\_\_\_ (during 2019-2020)

13. Student's occupational status for summer 2019.  
\_\_\_\_\_ full-time employee \_\_\_\_\_ part-time employee  
\_\_\_\_\_ full-time student \_\_\_\_\_ part-time student

14. Student's occupational status for academic year 2019-2020. Check those applicable:  
\_\_\_\_\_ full-time employee \_\_\_\_\_ part-time employee  
\_\_\_\_\_ full-time student \_\_\_\_\_ part-time student

15. Describe any circumstances that warrant special consideration:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

16. What college/university will the student attend during 2020-2021? \_\_\_\_\_

Applicant's name \_\_\_\_\_  
 E-mail address: \_\_\_\_\_

**Student Statement**

**PART II – Student's and Spouse's (or prospective spouse's) Earnings & Assets**

(All items must be answered. If none for some items in 2019-2020 enter "0". If employment and earnings, etc. are unknown and are anticipated for 2020 write "est." next to entry.)

	<u>2019</u>	<u>Summer</u>	<u>2020</u>
1. Student's wages, salaries, tips, interest, dividends, and other income after taxes and FICA.	\$ _____		\$ _____
2. Spouse's or prospective spouse's wages, salaries, tips, interest, dividends, and other income, after taxes and FICA.	\$ _____		\$ _____
TOTAL	\$ _____		\$ _____
	<u>Nine-Month Academic Year</u>		
	<u>2018-2019</u>		<u>2019-2020</u>
3. Student's academic year wages, salaries, tips; interest, dividends, and other income, after taxes and FICA (do not include work study).	\$ _____		\$ _____
4. Spouse's academic year wages, salaries, tips; interest, dividends, and other income, after taxes and FICA (do not include work study).	\$ _____		\$ _____
5. Student's non-taxable income (social security, veteran's benefits, etc.).	\$ _____		\$ _____
6. Spouse's non-taxable income (social security, veteran's benefits, etc.).	\$ _____		\$ _____
7. Financial assistance from student's parents.	\$ _____		\$ _____
8. Financial assistance from spouse's parents.	\$ _____		\$ _____
9. Student's scholarships, grants, etc.	\$ _____		\$ _____
10. Spouse's scholarships, grants, etc.	\$ _____		\$ _____
TOTAL	\$ _____		\$ _____
11. Assets - bank accounts, stocks, other investments (give principal amount, not earned interest or dividends) - current market value less anything owed = equity amount.	\$ _____		\$ _____
a. Cash, savings, checking accounts - equity	\$ _____		\$ _____
b. Home - equity	\$ _____		\$ _____
c. Other real estate and investments - equity	\$ _____		\$ _____
d. Business/Farm - equity	\$ _____		\$ _____
12. Have you or will you apply for a loan to help meet your educational expenses for the 2019-2020 academic year?	(    ) YES		(    ) NO
If so, what is the amount?	\$ _____		

Applicant's name \_\_\_\_\_  
 E-mail address: \_\_\_\_\_

**Student Statement**  
**PART III – Student's and Spouse's (or Prospective Spouse's) Expenses**

All items must be answered. If none for some items in 2019-2020 enter "0". If exact amount unknown enter an anticipated figure for 2020 and write "est." next to entry.)

	<u>Summer 2019</u>	<u>Summer 2020</u>
1. Student's (and spouse's, if applicable) living expenses.	\$ _____	\$ _____
<u>Nine-Month Academic Year</u>		
	<u>2018-2019</u>	<u>2019-2020</u>
2. Student's tuition and fees.	\$ _____	\$ _____
3. Student's books, supplies, etc.	\$ _____	\$ _____
4. Spouse's (if a student) tuition, books, supplies, etc.	\$ _____	\$ _____
5. Student's (and spouse's, if applicable) room and board (complete one of the following):		
• lives with parents & commutes, or maintains own household & commutes, or	\$ _____	\$ _____
• lives in sorority house, or	\$ _____	\$ _____
• lives in school residence hall, or	\$ _____	\$ _____
• other (describe) _____	\$ _____	\$ _____
6. If student commutes to school, give fare.	\$ _____	\$ _____
7. If spouse commutes to school, give fare.	\$ _____	\$ _____
8. Medical, dental expenses (combine if married) not covered by insurance.	\$ _____	\$ _____
9. Miscellaneous expenses (combine if married). Identify _____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____
10. Indebtedness (lender and purpose)	\$ Amount Owed as of 9/2019	\$ Amount Owed during 2019-2020
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____

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 IMPORTANT: Please note the FAQ must be notarized in two places: the bottom of pages 4 and 6.

**Student's Statement Notarization**

State of \_\_\_\_\_  
 County of \_\_\_\_\_

\_\_\_\_\_ (legal name), being duly sworn, deposes and says that I am the applicant referred to herein and the information set forth is true and complete to the best of my knowledge, information and belief.

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 2019.

\_\_\_\_\_  
 (Applicant's Signature)

\_\_\_\_\_  
 (Notary Public's Signature)

My commission expires:

Applicant's name \_\_\_\_\_  
E-mail address: \_\_\_\_\_

**Parent Statement**  
**PART IV – General Information**  
(To be completed by parents only if student is dependent.)

1. \_\_\_\_\_  
Name of father, stepfather or male guardian Date of Birth

\_\_\_\_\_

Home address

\_\_\_\_\_

Occupation Title

\_\_\_\_\_

Employed by Number of Years

2. \_\_\_\_\_  
Name of mother, stepmother or female guardian Date of Birth

\_\_\_\_\_

Home address

\_\_\_\_\_

Occupation Title

\_\_\_\_\_

Employed by Number of Years

3. Number of dependent children claimed, or to be claimed, as U.S. income tax exemptions (include student filing this form):

2018 (     )                      2019 (     )

4. Number of other dependents claimed, or to be claimed, as U.S. income tax exemptions (do not include children noted in No. 3 or yourself or spouse):

2018 (     )                      2019 (     )

5. List dependent children other than student filing this form who will be enrolled in college or other educational institution beyond high school (at least half-time) during 2019-2020 academic year:

NAME	AGE	SCHOOL	LOCATION	YEAR IN SCHOOL	UNREIMBURSED TUITION & FEES	FULL/HALF TIME

6. Explanations and unusual circumstances Use this section to explain any items you feel need more elaboration. If parents are divorced or separated use this section to explain financial agreements on alimony, child support and educational contributions. Attach an additional page if more room is needed. Include applicant's name on any attached pages.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Applicant's name \_\_\_\_\_  
 E-mail address: \_\_\_\_\_

**Parent Statement**  
**PART V – Parent Earnings & Assets**  
 (To be completed by parents only if student is dependent.)

All items must be answered. If none for some items, enter "0".

	<u>2018</u>	<u>Estimated 2019</u>
1. Wages, salaries, tips, interest, dividends after taxes and FICA	\$ _____	\$ _____
Father or stepfather	\$ _____	\$ _____
Mother or stepmother	\$ _____	\$ _____
2. Non-taxable income (social security, veterans benefits, child support)	\$ _____	\$ _____
TOTAL	\$ _____	\$ _____
3. ASSETS	<u>present market</u>	<u>unpaid mortgage</u>
	<u>value</u>	<u>principal</u>
Home, if owned or being purchased	\$ _____	\$ _____
Year purchased _____		
Purchase price _____		
Other real estate	\$ _____	\$ _____
Investments (stocks, bonds)	\$ _____	\$ _____
Business (include your share only of all business and farm assets)	\$ _____	\$ _____
Cash, savings and checking accounts	\$ _____	\$ _____
4. INDEBTEDNESS (personal and business)		
<u>Lender</u>	<u>Amount</u>	<u>Due Date</u>
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
_____	\$ _____	\$ _____
5. Medical and dental expenses not covered by insurance in 2018 calendar year.	\$ _____	

*IMPORTANT: Please note the FAQ must be notarized in two places: the bottom of pages 4 and 6.*

**Parent's Statement Notarization**

State of \_\_\_\_\_  
 County of \_\_\_\_\_

\_\_\_\_\_ (legal name), being duly sworn, deposes and says that I am the applicant referred to herein and the information set forth is true and complete to the best of my knowledge, information and belief.

\_\_\_\_\_  
 (Parent's Signature)

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_ 2020.

\_\_\_\_\_  
 (Notary Public's Signature)

My commission expires: