## 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? ____________________

### Dependent Child Information

*(Fill out 301-308 for each dependent child.)*

**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)? ____________________

### Dependent Adult Information

*(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) ____________________

Help is only a phone call or email away. Call Centers are open 24/7/365.
**1-877-326-FAST (3278) // help@ismfast.com**

## 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** Annual Income ______

**601b** Annual Income ______

**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) ______

______

______

## 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.

**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.

**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.

Help is only a phone call or email away. Call Centers are open 24/7/365.
**1-877-326-FAST (3278) // help@ismfast.com**

**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 Paid**
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 Annual Income**
Enter your gross wages, before any deductions, as reported on the Federal 1040 form and supported by W-2s for the prior year. Your section 125 deductions will be listed elsewhere.

**602 Business Income**
Enter the total amount of income reported on a 1040 tax form as a result of owning a business. If there was no income, enter a zero. You many not enter a negative number.

**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.

**604 Capital Gains Income**
Enter the total amount of capital gains earned as reported on your federal tax return.

**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, income as reported on a 1099 form and/or pay from moonlighting jobs. Also include earnings received from hobbies, court awards, disability benefits, gambling, or social security payments. 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.

**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. Include any supplemental policies in addition to your primary policy. 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.

**710 Heating**
If your heating costs are not included in your electric payments, enter the amount you pay annually to heat your house. 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.

**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 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. The total tax is found in Line 60 if you filed 1040; Line 37 if you filed 1040A and Line 11 if filed 1040EZ.

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.