

Financial documents for 2025-26 FAFSA & CSS Profile

Here are the documents needed to complete FAFSA and CSS Profile applications for financial aid.
You may need only some of these forms, depending on your financial situation.

Income

Parent/s	FAFSA	CSS Profile
2023 Federal Tax Returns		
Form 1040	✓	✓
Form 1040, Schedule 1 - Additional Income and Adjustments to Income	✓	✓
Form 1040, Schedule 3 - Nonrefundable Credits		✓
2023 child support received	✓	✓
2023 W-2s		✓
2023 1099s		✓
2023 Social Security SSA-1099		✓

Student	FAFSA	CSS Profile
2023 Federal Tax Returns (if applicable)		
Form 1040	✓	✓
Form 1040, Schedule 3 - Nonrefundable Credits		✓
2023 W-2s	✓	✓

Assets

Parent/s & Student	FAFSA	CSS Profile
<i>Accounts - balances on date of submission</i>		
Savings	✓	✓
Checking	✓	✓
CDs (Certificates of Deposit)	✓	✓
Brokerages includes: stocks, stock options, savings bonds, bonds, mutual funds, money market funds	✓	✓
529 college savings plans	✓	✓
Pre-paid tuition plans (refund value)	✓	✓
Other college savings plans (Coverdell)	✓	✓
Non-qualified (non-retirement) annuities	✓	✓
Trust funds	✓	✓
Commodities, precious and strategic metals	✓	✓
Installment and land sale contracts (including seller-financed mortgages)	✓	✓
Retirement Accounts (pension, annuity, and savings plans such as an IRA, Roth IRA, Keogh, SEP, 401(a), 401(k), 403(b), 408, 457, 501(c))		✓

Parent/s	FAFSA	CSS Profile
<i>Properties - values and statements on date of submission</i>		
Second properties - current market value	✓	✓
Second properties - mortgage statement	✓	✓
Form 1040, Schedule E - for rental properties		✓
Primary home - current market value		✓
Primary home - mortgage statement		✓

Other financial info

Parent/s	FAFSA	CSS Profile
<i>Businesses owned - value on date of submission, 2023 Federal Business Tax Returns</i>		
Value of business (generally considered tangible assets)	✓	✓
Debt outstanding on business	✓	✓
Form 1040, Schedule C - Sole Proprietor		✓
Form 1040, Schedule E & Form 1065 - Partnership		✓
Form 1040, Schedule E & Form 1120 or Form 1120-S - Corporation		✓

Parent/s	FAFSA	CSS Profile
<i>Expenses - both 2023 and estimated for 2024</i>		
Medical & dental costs not covered by insurance includes premiums, co-pays, out-of-pocket		✓
Student loan statements for parent education		✓
Parent loan statements for student applicant education		✓
Parent loan statements for sibling education		✓
Alimony paid		✓
Child support paid		✓

<i>Expenses - both 2024-25 and estimated for 2025-26</i>		
Sibling private school: 1. cost of attendance; 2. grants received and 3. total educational expenses paid		✓
Sibling university: 1. cost of attendance; 2. grants received and 3. total educational expenses paid		✓