



Financial Aid Questionnaire

INSTRUCTIONS:

This document covers information that is supplemental to the SSS by NAIS Parents' Financial Statement (PFS). Complete the following questions, save the document, and submit by email to financialaid@wellington.org.

INCOME:

1. Did you receive capital gains in the last tax year? Yes No
(If no, skip to question #2)

a. What is the amount your family has received in capital gains income so far this year?

2. Are you, your spouse, or dependents named as owners/partners on any real estate other than your residence? Yes No

Do you have a second home? *(If no, skip to question #3)* Yes No

a. Complete the following grid for each property. Use additional sheets, if needed.

Property Street Address	Annual Rental Income	Current Value	Purchase Price	Original Mortgage Value	Remaining Mortgage Amount

3. Have you, your spouse, or dependents received monetary gifts in excess of \$1,000 this year? Yes No
(If no, skip to question #4)

a. Please list the gift amounts below.

Year	Amount
Last Tax Year	
This Year	

4. Are you or any family member named in a trust? Yes No
(If no, skip to question #5)

a. Do you, your spouse, or dependents receive any trust income? Yes No
(If no, skip to question #5)

b. Please list the amount of trust income received in the last year.

c. Will this amount be the same next year? Yes No

If not, please explain.

5. Are there any additional adults living in your household? Yes No

(If no, skip to question #6)

If yes, please complete the grid below.

Relationship to Student	Employed?	Annual Income	Included in PFS?
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No		<input type="checkbox"/> Yes <input type="checkbox"/> No

6. Is any person besides a parent supporting or contributing toward tuition? Yes No

(If no, skip to question #7)

a. If yes, what amount?

7. Are you or any family member supporting someone outside your household? Yes No

(If no, skip to question #8)

a. Please list the annual amount of support and describe the purpose of the support.

8. Have you received stock options or other non-cash compensation, including deferred compensation? Yes No

(If no, skip to question #9)

a. What is the value of the annual compensation or stock options for last year and the projected amount for this year?

b. If you have received stock options, what is the total amount of your stock option account?

c. Do you or your spouse utilize a deferred compensation option offered by your employer? Yes No

d. If yes, what is the total amount of compensation deferred?

9. Are you owed back alimony or child support? Yes No

(If no, skip to question #10)

EXPENSES:

10. Do you pay for child care (including nanny services)? Yes No
- a. If yes, what is the monthly amount?
11. Are you, your spouse, or dependents members of a country club? Yes No
(If no, skip to question #12)
- a. What are the annual club expenses, including dues and estimated travel or food expenses?
12. Do your dependents participate in a club sport? Yes No
(If no, skip to question #13)
- a. What are the annual club expenses, including any fees and estimated travel or food expenses?
13. Do you, your spouse, or dependents participate in a time share? Yes No
(If no, skip to question #14)
- a. What are the annual expenses, including any fees?
14. Is any adult in the household currently enrolled in school? Yes No
- a. If yes, what are the annual costs?
15. Are any dependents currently enrolled in tuition-based schools other than Wellington? Yes No
(If no, skip to question #16)
- a. If yes, please list name(s) and place(s) of enrollment.
- b. What is the full amount of annual tuition for each student prior to any financial aid, scholarships, or grants?
- c. What amount of financial aid and scholarships/grants offsets the tuition for each non-Wellington dependent?
16. Do you have monthly household expenses such as housecleaning, lawn service, landscaping, etc.? Yes No
(If no, skip to question #17)
- a. If yes, what is the total annual cost for such services?

LIABILITIES:

17. Do you have any outstanding personal loans?

Yes No

(If no, skip to question #18)

a. What is the outstanding balance?

b. What is the purpose of the loan?

NARRATIVE:

18. What is the annual amount you can contribute towards tuition?

19. Is there additional information you would like for the committee to review when considering your financial aid application?

20. Are your circumstances expected to change? If so, please explain.

21. Will you require financial aid in future years?