

Class of 2031 Financial Aid Early Estimate: Custodial Parent(s)

For students planning to enroll at Columbia University in the Fall semester of 2027

Section A-Student Information

Student's Last Name: _____ First Name: _____

Sport: _____ Columbia Coach Name: _____

☐ First Year

☐ Transfer

Name of Family Member to contact if any questions about the enclosed documentation

Family Member Contact Phone

Family Member Contact Email

Student's Street Address: _____

City: _____ State: _____ Zip Code: _____

(For students outside the USA and Puerto Rico) Postal Code: _____ Country: _____

Student's Preferred Phone Number: _____

Student's Email: _____

Student's Date of Birth (MM/DD/YYYY): _____

What is the student's citizenship status? ☐ U.S. citizen or [Eligible Noncitizen](#) ☐ International Student

Section B- Student's Financial Information & Expected Resources

1. Did the student file a tax return for 2025? ☐ Yes ☐ No
2. 2025 Income earned from work by student: \$ _____
3. 2025 untaxed income received by student (ie. Social Security benefits): \$ _____
4. Student's Cash, savings and checking accounts (as of today): \$ _____
5. Investments (including Uniform Gifts to Minors): \$ _____
6. Does the student own any real estate? ☐ Yes ☐ No
7. Does the student own any businesses? ☐ Yes ☐ No
8. Is the student a beneficiary to a Trust? ☐ Yes ☐ No
9. What amount (of the total student assets) is from parents? \$ _____
10. Tuition benefits from the parents' and/or the student's employer? \$ _____
11. Amount the student's parent(s) estimate they will be able to pay for the student's 2027-2028 college expenses? \$ _____

Section C-Parents' Household Information

12. What is the current marital status of the student's biological or adoptive parents?

- ☐ Married/Domestic Partnership (skip to #15) ☐ Separated ☐ Divorced ☐ Widowed
☐ Never Married, Living Separately ☐ Never Married, Living Together
☐ Single Adoptive Parent or Single Parent of donor-conceived child

13. Does the student have a Noncustodial Parent (divorced/separated/never married & live separately)?

- ☐ No, the student's natural parents are married/living together or widowed.
☐ Yes, Noncustodial Parent will also submit Early Estimate documentation and taxes.

Noncustodial Parent's Name

Noncustodial Parent's Email

- ☐ Yes, but there is no contact with the Noncustodial Parent and a letter of explanation will be submitted by the student explaining the timeline and level of current contact.¹

To be answered by the parent/custodial household members who are completing this form.

14. What is the current marital status of the student's parents whose information is being provided on this application?

- ☐ Married/Remarried/Domestic Partnership ☐ Separated ☐ Divorced ☐ Widowed
☐ Never Married, Living Separately ☐ Never Married, Living Together
☐ Single Adoptive Parent or Single Parent of donor-conceived child

a. If your parent has remarried, enter date of remarriage _____

15. Parent I Information:

- a. ☐ Parent ☐ Stepparent ☐ Legal Guardian ☐ Other: _____
b. Name: _____ Date of Birth: _____
c. Occupation: _____ Employer: _____
d. Preferred telephone: _____ Email Address: _____

16. Parent II Information:

- a. ☐ Parent ☐ Stepparent ☐ Legal Guardian ☐ Other: _____
b. Name: _____ Date of Birth: _____
c. Occupation: _____ Employer: _____
d. Preferred telephone: _____ Email Address: _____

17. How many people are in your parents' household? Always include the student & parent(s). _____

18. How many will be undergraduate college students enrolled at least ½ time for 2027-2028²? _____

19. What is your parents' state of legal residence? _____

¹ PLEASE NOTE: If the student's parents are DIVORCED/ SEPARATED/ NEVER MARRIED, then EACH parent must fill out a separate version of this form. If you will have difficulty providing this information, please contact our office. Columbia's policy views financial aid as a partnership between the student, the biological or adoptive parents, and the school. While the application process has requirements for the student and both parents, the university recognizes that unusual or complicated family circumstances can prevent the completion of a financial aid application. If you are not in contact with your Noncustodial Parent, you can submit a request to waive the non-custodial parent requirements. If you would like to request a Noncustodial Parent Waiver Request form, please contact our office.

² Please answer for the year in which the student applicant will begin enrollment at Columbia University. Enter the # of students (including the APPLICANT) who will be enrolled in college for 2027-2028 (the APPLICANT's 1st year at Columbia). Do not include parents in # of college students. If a PARENT will be enrolled as a student in 2027-2028 please explain in SPECIAL CIRCUMSTANCES.

Section D-Parents' Expenses

20. Child support your parents paid because of divorce or separation or as a result of a legal requirement 2025 _____ Esti 2026 _____
21. Repayment of parents' educational loans (monthly amount x 12). Explain loan type/purpose in Section H. 2025 _____ Esti 2026 _____
22. Medical and dental expenses not covered by insurance 2025 _____ Esti 2026 _____

23. Total elementary, junior high and high school tuition paid for dependent children. <i>For 2027-2028, only include pre-college tuition expenses for the applicant's SIBLING(s), not the applicant.</i>		2026-2027: Student's Senior Year of High School	2027-2028: 1 st Year @ Columbia
	Amount paid?		
	For how many dependent children?		

Section E- Parents' Assets: *Please list all PARENT Assets here: all accounts, all properties, all businesses. Please only list an asset value once. Indicate if only a percentage ownership. Remember to submit related business tax documents: all K-1s, all Partnership(s), Corporation(s), and S-Corporation(s) tax returns.*

24. Cash, savings and checking accounts (as of today)? _____
25. Total value of parents' assets held in the names of the student and/or the student's siblings (who are under age 19 and not college students) including 529 Plans? _____
26. Monthly home mortgage or rental payment (if none, explain living situation in Section H)? _____
27. Do the parent(s) own the home residence? ☐ Yes ☐ No

- a. What is the current market value? _____ What is owed on it? _____
- b. Year Purchased? _____ Home Purchase Price? _____

28. Do the parent(s) own real estate other than the home residence? ☐ Yes ☐ No

- | | Real Estate #1 | Real Estate #2 | Real Estate #3 | Real Estate #4 |
|--------------------------------------|----------------|----------------|----------------|----------------|
| a. What is the current market value? | _____ | _____ | _____ | _____ |
| b. What is owed on it? | _____ | _____ | _____ | _____ |
| c. Year Purchased: | _____ | _____ | _____ | _____ |
| d. Other Real Estate Purchase Price: | _____ | _____ | _____ | _____ |

**If more than 4 properties (other than home), please Question #28 answers for each on a separate sheet.*

29. Investments (**not** including 401K or 403B retirement accounts)
- a. What is the current market value? _____ What is owed on them? _____

30. Business/Farm: Does the student's family own all or part of a business/farm?
- ☐ No, none of the student's family members are self-employed or own any portion of a business/farm.
- ☐ Yes, the family is self-employed/owns business and will provide the appropriate tax documentation (Schedule C, Schedule E, Schedule F, 1065 Partnership Return, 1120 Corporation Return and/or 1120-S S-Corporation Return)

Name of Business/Farm	% Ownership*	Type of Business Taxes
Current market value (family's % of total)? _____	Debt (family's % of total)? _____	_____

Name of Business/Farm	% Ownership*	Type of Business Taxes
Current market value (family's % of total)? _____	Debt (family's % of total)? _____	_____

** If the total % ownership of a business/farm entity by the family $\geq$ 5%, please submit complete and full business/farm tax documents: all pages, all schedules, all attachments and all K-1s.*

**If more than 2 businesses/farms, please provide Question #30 answers for each on a separate sheet.*

Section F-Parents' Income and Benefits: *Itemize all sources of actual and estimated parent income (taxed and untaxed). Please include estimates for both years, listing both positive income and/or (loss). Attach documents (recent paystubs; job loss documentation) supporting your estimates. Line #s below refer to the US Tax Return standard 1040 tax form.*

31. Do the parent(s) file federal US Income Tax Returns? ☐ Yes ☐ No
If no, skip questions which do not apply, but please be sure to list all sources of annual income so that we understand your household's financial circumstances.

	2025 Actual	2026 Estimate
32. Parent 1's Wages W-2 Box 1: Name = _____	\$ _____	\$ _____
33. Parent 2's Wages W-2 Box 1: Name = _____	\$ _____	\$ _____
34. Interest Income:	\$ _____	\$ _____
35. Dividend Income:	\$ _____	\$ _____
36. Tax Refunds:	\$ _____	\$ _____
37. Alimony Received:	\$ _____	\$ _____
38. Schedule C Business Income or (loss):		

If there is more than one Schedule C entity, please include a breakdown of expected income and expected loss to explain the net amount of the combined Schedule C #s.

Sch C Business Income(s)	\$ _____	\$ _____
Sch C Business Loss(es)	\$ _____	\$ _____

39. Schedule D Capital Gain or (loss):	\$ _____	\$ _____
40. Other gains or (loss):	\$ _____	\$ _____
41. IRA/Pension Disbursements/Benefits:	\$ _____	\$ _____
42. Schedule E/F Business/Farm Income or (loss):		

If there is more than one Schedule E/F entity, please include a breakdown of expected income and expected loss to explain the net amount of the combined Schedule E/F #s. For example, please list income and losses separately for rental income, for each S-Corp, Partnership, and/or Trust.

Sch E Business Income(s)	\$ _____	\$ _____
Sch E Business Loss(es)	\$ _____	\$ _____
Sch F Farm Income(s)	\$ _____	\$ _____
Sch F Farm Loss(es)	\$ _____	\$ _____

43. Unemployment compensation: 1040	\$ _____	\$ _____
44. Social Security benefits: 1040	\$ _____	\$ _____
45. Other Income: (please explain in Section H)	\$ _____	\$ _____
46. Adjustments to Income:	\$ _____	\$ _____
47. Adjusted Gross Income:	\$ _____	\$ _____
48. Standard/Itemized Deductions:	\$ _____	\$ _____
49. U.S. income tax paid:	\$ _____	\$ _____

UNTAXED INCOME	2025 Actual	2026 Estimate
50. Pre-Tax Retirement Contributions ³	\$ _____	\$ _____
51. Pre-Tax Flexible Spending Accounts: ⁴	\$ _____	\$ _____
52. Child Support Received (all children in household)	\$ _____	\$ _____
53. Untaxed Pension/Disability/Social Security Benefits	\$ _____	\$ _____
54. Temporary Assistance for Needy Families (TANF)	\$ _____	\$ _____
55. Housing/living allowances: military, clergy, etc.	\$ _____	\$ _____
56. Other Income (e.g. loans/gifts; please explain in Section H)	\$ _____	\$ _____

³ W-2 Box 12 (Codes D, E, F, G, H, S) and/or Deductible IRA and/or SEP, SIMPLE, or Keogh payments
⁴ Please include all Pre-Tax Caf  Plans, HSA/FSA and Flexible Healthcare Spending Plans

Section G-Family Member Listing: Give information for all family members entered in the household; estimate enrollment information and educational expenses for the 2026-2027 academic year and the 2027-2028 academic year to the best of your ability. Include Parents in Household Chart, as well as all other family members or household members who live with you and/or are financially supported by your family. If more than 5 people, please use extra space below.

57.	Household Chart	Family Member 1	Family Member 2	Family Member 3	Family Member 4	Family Member 5
	Relationship	Student Applicant				
	Current Age					
	Full Name					
Student's Senior Year of High School: 2026-27	Name of School/College					
	Year in School	12 th Grade				
	Enrollment/Type	Full-Time/Pre-College				
	Cost of Attendance					
	Scholarships/Grants					
	Parent Contribution					
1 st Year @ COLUMBIA: 2027-28	Name of School/College	Columbia University				
	Year in School	1 st Year Undergraduate				
	Enrollment/Type	Full-Time/4 yr. Private				
	Cost of Attendance					
	Scholarships/Grants					
	Parent Contribution					

58. Additional Information/Explanation about Household Members (*please provide Question #57 answers for each*):

59. Does your family provide financial support to any relatives not in the household? ☐ Yes ☐ No (If yes, please explain, including names of the relatives, relationship to student, amount of financial support, yearly/monthly?)

Section H-Explanations/Special Circumstances: Use this space to explain any unusual one-time or recurring expenses such as high medical or dental costs not covered by insurance, educational debts and other debts, child care, elder care or other unusual expenses. Also, use this space to explain any special circumstances related to current or future income, such as job loss, anticipated increases/decreases in income, one-time sources of income, or any other recurring or non-recurring special circumstances. Please provide specific amounts and timelines in order to help us better understand your situation. **If more space is needed, use sheets of paper and attach them to this form.**

60. List the names of the colleges/universities you are applying to/being recruited by:

Columbia University _____

Attachments: Please indicate which additional forms and tax documents you are submitting.

☐ Parents 2025 U.S. Income Tax Returns and W-2s	Include all pages, all schedules, all attachments: Schedules A, B, C, D, E, F, etc. Also include copies of your parent's 2025 W-2 and/or 1099 forms.
☐ Student's 2025 U.S. Income Tax Returns and W-2s	Required only if the student filed a tax return in 2025.
☐ 2025 Business Tax Return(s): 1120 Corporation, 1120S S-Corporation or 1065 Partnership	K-1s are required for families who own any portion of a business or partnership. If the family's ownership ≥ 5%, complete business tax returns are required: please include all pages, all schedules and all attachments.
☐ Non-Custodial Parent's Form and Tax Documentation (submitted separately)	Required if the student's biological or adoptive parents are currently divorced or separated or were never married. This form is to be completed by the non-custodial parent(s). The non-custodial parent(s) must also forward copies of all tax documents for their household.
☐ Non-Custodial Parent Waiver Request Letter/Form	
☐ Letter of Special Circumstances	

Certification: All the information on this form is true and complete to the best of my knowledge. If asked, I agree to give proof of the information that I have given on this form. I realize that this proof may include a copy of my U.S., state or local income tax returns. I certify that all information is correct at this time, and that I will send timely notice to the college of any significant change in family income or assets, financial situation, college plans of other children, or the receipt of other scholarships or grants.

SIGNATURE of STUDENT _____ DATE _____

SIGNATURE of PARENT I _____ DATE _____

SIGNATURE of PARENT II _____ DATE _____