
Personal Information

Notre Dame College Handbook

Personal Information

Your Legal Name (*the name you will use consistently on all paperwork*): _____

Driver's License Number: _____ State: _____ Social Security Number (SSN): _____

Email address (*the professional one you will use for college apps*): _____

Parent Information

Mother's (Stepmother's) Date of Birth: ___/___/_____ SSN: _____

College Mother Attended (if applicable): _____ CEEB: _____ Degree: _____

Graduate School Mother Attended (if applicable): _____ CEEB: _____ Degree: _____

Father's (Stepfather's) Date of Birth: ___/___/_____ SSN: _____

College Father Attended (if applicable): _____ CEEB: _____ Degree: _____

Graduate School Father Attended (if applicable): _____ CEEB: _____ Degree: _____

Date parents became legal residents (if applicable): ___/___/_____

Date married/divorced/widowed: ___/___/_____

Sibling Information

Sibling Name: _____ Undergraduate School: _____

Degree/Date of Graduation: _____

Sibling Name: _____ Undergraduate School: _____

Degree/Date of Graduation: _____

High School Information

School Name: _____

Mailing Address: _____

School's CEEB Code: _____

My counselor's name: _____

Counselor Contact Information: Phone _____ Email _____

Password/ID Information

Notre Dame College Handbook

College Board www.collegeboard.org

User Name: _____

Password: _____

ACT www.act.org

User Name: _____

Password: _____

Common App www.commonapp.org

User Name: _____

Password: _____

Coalition App www.coalitionforcollegeaccess.org

User Name: _____ Password: _____

SCOIR www.scoir.com

User Name: _____ Password: _____

FAFSA FSAID:

User Name: _____

Password: _____

CSS/Profile:

User Name: _____

Password: _____

Fastweb Scholarships www.fastweb.com

User Name: _____

Password: _____

Additional Sites/Apps You Will Access

1) _____

User Name: _____

Password: _____

2) _____

User Name: _____

Password: _____

3) _____

User Name: _____

Password: _____

Goals by Year

Notre Dame College Hanbook

9th Grade

Academic Goals

Achieved Y/N

Extracurricular Activity Goals

Achieved Y/N

Other Ideas or Goals

Achieved Y/N

10th Grade

Academic Goals

Achieved Y/N

Extracurricular Activity Goals

Achieved Y/N

Other Ideas or Goals

Achieved Y/N

Notes

Goals by Year

Notre Dame College Hanbook

11th Grade

Academic Goals

Achieved Y/N

Extracurricular Activity Goals

Achieved Y/N

Other Ideas or Goals

Achieved Y/N

12th Grade

Academic Goals

Achieved Y/N

Extracurricular Activity Goals

Achieved Y/N

Other Ideas or Goals

Achieved Y/N

Notes

Activities/Honors List 9th

(Don't be discouraged – you are not expected to be able to completely fill this page!)

Academic Distinctions or Honors

Sports

Level (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Community Service/Volunteer Work

Role (if applicable)

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<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Paid Employment

Dates

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Other Extracurricular Activity

Role (if applicable)

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<hr/>	<hr/>
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Activities/Honors List 10th

(Don't be discouraged – you are not expected to be able to completely fill this page!)

Academic Distinctions or Honors

Sports

Level (if applicable)

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<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Community Service/Volunteer Work

Role (if applicable)

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<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Paid Employment

Dates

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Other Extracurricular Activity

Role (if applicable)

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<hr/>	<hr/>
<hr/>	<hr/>

Activities/Honors List 11th

(Don't be discouraged – you are not expected to be able to completely fill this page!)

Academic Distinctions or Honors

Sports

Level (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Community Service/Volunteer Work

Role (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Paid Employment

Dates

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Other Extracurricular Activity

Role (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Activities/Honors List 12th

(Don't be discouraged – you are not expected to be able to completely fill this page!)

Academic Distinctions or Honors

Sports

Level (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Community Service/Volunteer Work

Role (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Paid Employment

Dates

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Other Extracurricular Activity

Role (if applicable)

<hr/>	<hr/>
<hr/>	<hr/>
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<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

Activities/Honors Summary

(In each section, list the most significant or important first, down to the least.)

Academic Distinctions/Honors/Awards

Circle Year(s)

9 10 11 12

9 10 11 12

9 10 11 12

9 10 11 12

Community Service/Volunteer Work (indicate total hours)

Circle Year(s)

9 10 11 12

9 10 11 12

9 10 11 12

9 10 11 12

Paid Employment (indicate dates)

Circle Year(s)

9 10 11 12

9 10 11 12

9 10 11 12

9 10 11 12

Extracurricular Activities (Clubs, Sports, School Leadership, etc.)

Circle Year(s)

9 10 11 12

9 10 11 12

9 10 11 12

9 10 11 12

Other Experiences/Interests

Circle Year(s)

9 10 11 12

9 10 11 12

9 10 11 12

9 10 11 12

Educational and/or Career Goals (if known)

Testing Plan

SAT and/or ACT

Test Type (SAT, ACT, etc.)	Test Date	Location	Registration Due Date	Registration Complete <i>(mark YES when done)</i>	Ticket or Receipt
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____

SAT SUBJECT TESTS

Subject	Test Date	Location	Registration Due Date	Registration Complete <i>(mark YES when done)</i>	Ticket or Receipt
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____
_____	__/__/__	_____	__/__/__	_____	_____

AP TESTS

Subject	Test Date	Location	Registration Complete	Receipt (if required)
_____	__/__/__	_____	__/__/__	_____
_____	__/__/__	_____	__/__/__	_____
_____	__/__/__	_____	__/__/__	_____
_____	__/__/__	_____	__/__/__	_____

Testing Prep

This worksheet focuses on the inexpensive and mostly FREE test prep that is available. Most everyone can, and should, avail themselves of these affordable options. Of course, there are paid resources such as group classes and tutors if those are appropriate for you. Be sure to search for phone apps as well.

For SAT Practice: <https://www.khanacademy.org/sat> also search for SAT Prep apps for phones;

SAT Practice Test Log/Scores

Test Date	Reading & Writing	Math	Total	Essay (if applicable)
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____

ACT Prep <http://www.act.org/content/act/en/products-and-services/the-act/test-preparation.html>

Also search for ACT Prep apps for phones;

ACT Practice Test Log/Scores

Test Date	English	Math	Reading	Science	Composite (Average)
___/___/___	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____

Other Prep Accomplished

Testing Record – SAT ACT

SAT Test Results *(highlight best single sitting when done with all)*

My target (realistic) goal scores are: Reading & Writing _____ Math _____

Test Date	Reading & Writing	Math	Total	Essay (if applicable)
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____

Superscore: _____

ACT Test Results *(highlight best single sitting when done with all)*

My target (realistic) goal scores are: English ___ Math ___ Reading ___ Science ___ Writing ___

Test Date	English	Math	Reading	Science	Writing	Composite (Average)
___/___/___	_____	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____	_____
___/___/___	_____	_____	_____	_____	_____	_____

Superscore: _____

Notes *(jot down ideas, thoughts, middle 50% scores of some of your target colleges, etc.)*

Testing Record - Other

Early Testing (PSAT, Aspire, etc.) or Other Testing Not Shown Below

Test Type	Test Date	Score	Notes
_____	___/___/___	_____	_____
_____	___/___/___	_____	_____
_____	___/___/___	_____	_____

SAT Subject Tests

Test Date	Subject	Score	Notes
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____

Advanced Placement (AP) or International Baccalaureate (IB) Exams

Test Date	Subject	Score	Notes
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____
___/___/___	_____	_____	_____

College Characteristics

Rate each of the characteristics below from 1-5, 1 for low priority to 5 for high. Skip if not relevant at all. Also indicate your preference in terms of the different options for that characteristic. (i.e. for size, you might indicate a 4 as the priority, and “small” as your preference.)

Characteristic	My Preference	Priority 1-5 (5=high)
Size (number of students)	_____	_____
Rural (country), Urban (city) or some of each	_____	_____
Location (distance from home or special location/climate)	_____	_____
Public or Private	_____	_____
Emphasis on Academics (rigorous or not so much)	_____	_____
Particular major or course of study	_____	_____
Class size, taught by teaching assistants vs. professors	_____	_____
Religion affiliation	_____	_____
Cost/Aid Availability	_____	_____
Clubs and Activities	_____	_____
Special programs, study abroad, community service, etc.	_____	_____
Sports (Div I, II, III, Intramural, Club)	_____	_____
Social Life (students stay on weekends? School Spirit?)	_____	_____
Student Body – Diversity, Coed, Single Sec	_____	_____
Greek (Sorority / Fraternity) Presence	_____	_____
Selectivity (very selective, medium, not selective)	_____	_____
Beauty of Campus	_____	_____
Quality of Food/Housing	_____	_____
Library and other Facilities	_____	_____
Transportation and Parking	_____	_____
Other Characteristics <i>(not listed above)</i>		
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____
Other _____	_____	_____

My Preferences

From sheet 3.1, list the qualities you ranked in order of most important down to least. Don't even list ones that don't matter at all, unless you want to. Add extra detail to the description of each characteristic if you can. Try to have at least a top ten.

Characteristic	My Preference	Priority 1-5 (5=high)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List some words that you'd use to describe the students you'd like to have at school with you. Circle any you see below, and add your own. This will be important to have in mind on college visits.

Students I want on my campus:

<i>adventurous</i>	<i>spirited</i>	<i>introverted</i>	<i>opinionated</i>	<i>partier</i>	_____	_____
<i>studious</i>	<i>traditional</i>	<i>laid back</i>	<i>career-oriented</i>	<i>liberal</i>	_____	_____
<i>outgoing</i>	<i>unconventional</i>	<i>energetic</i>	<i>fun</i>	<i>focused</i>	_____	_____
<i>athletic</i>	<i>independent</i>	<i>religious</i>	<i>friendly</i>	<i>outdoorsy</i>	_____	_____
<i>compassionate</i>	<i>idealistic</i>	<i>diverse</i>	<i>shy</i>	<i>political</i>	_____	_____
<i>motivated</i>	<i>caring</i>	<i>artsy</i>	<i>serious</i>	<i>worldly</i>	_____	_____

Go back now and put a check next to the most important 5 or so. Next, using a colored marker, highlight those that describe YOU.

Other factors that will make a college the right choice for YOU:

College Fair List

(don't forget your online registration ticket, if applicable, when you go to the fair)

Fair Name _____

Fair Date(s): ___/___/___ ___/___/___ ___/___/___ ___/___/___

Location/Address: _____

Registration website or procedure: _____

Registered ___/___/___ Attended: ___/___/___

Colleges visited at fair: _____/_____

_____/_____/_____

Notes: _____

Fair Name _____

Fair Date(s): ___/___/___ ___/___/___ ___/___/___ ___/___/___

Location/Address: _____

Registration website or procedure: _____

Registered ___/___/___ Attended: ___/___/___

Colleges visited at fair: _____/_____

_____/_____/_____

Notes: _____

Fair Name _____

Fair Date(s): ___/___/___ ___/___/___ ___/___/___ ___/___/___

Location/Address: _____

Registration website or procedure: _____

Registered ___/___/___ Attended: ___/___/___

Colleges visited at fair: _____/_____

_____/_____/_____

Notes: _____

Early List of Possible Schools

Start to jot down schools that have caught your interest and that you'd like to research further. Remember the characteristics you thought were most important to you. Also, eventually (not necessarily at first) mark them as Likely/Safe, Target/Match, or Reach (L,T,R). You'll want to have some of each. Eventually, star or rank them on the right as you begin to narrow your list. This is a very preliminary list, so don't hold back!*

College	Website	How Many Top Ten Characteristics Met	L,T,R*	Rank
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**L,T,R – Look at the middle 50% of each school's GPA and test scores. If you are well above, mark the school "L". If you are on the high side of the middle 50%, mark it "T". Lower half or below the middle 50%, mark "R" for now.*

Target List

Start to narrow down your list. Pull from your Early List. Aim for 3-4 Likely/Safe, 3-4 Target/Match, and 3-4 Reach. Fill in your target list either by rank (first choice on top) or by L,T,R.

College	Notes	L,T,R*	Rank

**L,T,R – Look at the middle 50% of each school's GPA and test scores. If you are well above, mark the school "L". If you are on the high side of the middle 50%, mark it "T". Lower half or below the middle 50%, mark "R" for now.*

Comparison Worksheet #1

Pull from your Target List and select your favorites, but being sure to include at least 3 Likely/Safe, 3 Target/Match, and 3 Reach. Select more if you need to. We include lots of worksheets to help you compare your schools, so you can use those that work best for you. It is not necessary to complete all parts of all worksheets.

College Name	Choice	Size	----- Location & Setting -----			-----Academics -----						
	# 1-?	Number of Undergrad Students	Public Private	Urban Suburban Rural	Distance From Home	1=Likely 2=Target 3=Reach	How Selective	Average SAT/ACT	Average GPA	% Students in Top 10% of Class	Do they offer my major?	Student Faculty Ratio

**L,T,R – Look at the middle 50% of each school’s GPA and test scores. If you are well above, mark the school “L”. If you are on the high side of the middle 50%, mark it “T”. Lower half or below the middle 50%, mark “R”.*

Comparison Worksheet #1

College Name	Honors Program?	Internships & Research?	Sports		Social Life		Financial		Other	
			Do they offer my sport(s)?	Sororities Fraternities?	Students Leave on Weekends?	Social Life Rating	Total Annual Cost	Strong Financial Aid Pkgs?		

Notes:

Comparison Worksheet #2

	College Number 1	College Number 2	College Number 3	College Number 4	College Number 5	College Number 6	College Number 7	College Number 8	College Number 9
Choice (1st, 2nd etc)									
Size and Location									
# Undergraduate Students									
Public or Private									
Urban, Suburban, Rural									
Distance From Home									
How is the college "town"?									
How is the campus?									
Other									
Other									
Academics									
How Selective?									
Acceptance Rate %									
Average SAT or ACT									
Average GPA									
% Students in Top 10% of Class									
Student/Faculty Ratio or Class Size									
Research and/or Internships									
Honors Program									
Study Abroad									
Impressive Faculty									
Possible Major									
Career Assistance									
Other									
Other									

Comparison Worksheet #2

	College Number 1	College Number 2	College Number 3	College Number 4	College Number 5	College Number 6	College Number 7	College Number 8	College Number 9
Activities									
Offers the sports I want									
Offers activities I want									
Sororities/Fraternities									
Other									
Other									
Social Atmosphere									
Diversity Level									
Religious Factor									
Party Factor									
Do Students Leave on Weekends?									
Other									
Other									
Facilities									
Housing - On Campus									
Housing - Off Campus									
Cafeteria and Food Quality									
Other									
Other									
Annual Cost									
Tuition									
Room and Board									
Other									
TOTAL									
Can I afford this School?									

Detail Sheet for _____

Complete a Detail Sheet for each target school. Fill in the college name in the header above. It's important that you have this information handy for each school. Add your own thoughts in the bottom section.

Type of School (circle all that apply) Public Private Liberal Arts University College 2-Year

Types of Admission Offered (circle all that apply) Early Decision (binding) Early Action (not binding) Regular
Early Action (restrictive) Rolling Other _____

Selectivity (circle one) L T R

Middle 50% SAT Score Range: _____ - _____ Middle 50% ACT Composite Score Range: _____ - _____

Average GPA: _____ My GPA: _____ % In Top 10% of Class: _____% Top 20%: _____% Top 50%: _____%

Total number of applicants: _____ % Accepted: _____ Am I likely to get in? Y / N

Test Requirements (circle all that apply)

SAT or ACT SAT Subjects Other _____

SAT or ACT Writing AP/IB _____ Other _____

Other Requirements

References Required _____

Common App Accepted? Y / N

Universal App Accepted? Y / N

If yes, additional requirements: _____

Interviews Offered? Y / N If Yes, required? Y / N If yes, note how to schedule the interview:

Private Visits Offered? Y / N Describe visitation options and procedures:

Annual Cost

Tuition \$ _____ Room \$ _____ Meal Plan/Food \$ _____ Fees \$ _____

Transportation Home and/or Parking \$ _____ Other \$ _____

Total Annual Cost \$ _____ Probably Affordable: Y / N (don't eliminate yet)

My Thoughts

What I like about this school:

What I'm not sure or don't like about this school:

Demonstration of Interest

You need to let your target schools know you are interested. This is accomplished by taking advantage of every possible contact point with the school. This list will help ensure that you do this for each. As visits/interviews are scheduled, record the dates and locations on your calendar (written or electronic, or both)

College _____ Completed Research: ___/___/___ On their Mailing List: ___/___/___ Obtained Catalog: ___/___/___

Visit Date(s)

___/___/___ Notes: _____

Visit Date(s)

___/___/___ Notes: _____

Interview(s) (Type = (A)lumni, (R)epresentative, (G)roup, or (I)ndividual)

___/___/___ Type:___ Contact Name:_____ Email: _____ Thank You Sent: ___/___/___

___/___/___ Type:___ Contact Name:_____ Email: _____ Thank You Sent: ___/___/___

College _____ Completed Research: ___/___/___ On their Mailing List: ___/___/___ Obtained Catalog: ___/___/___

Visit Date(s)

___/___/___ Notes: _____

Visit Date(s)

___/___/___ Notes: _____

Interview(s) (Type = (A)lumni, (R)epresentative, (G)roup, or (I)ndividual)

___/___/___ Type:___ Contact Name:_____ Email: _____ Thank You Sent: ___/___/___

___/___/___ Type:___ Contact Name:_____ Email: _____ Thank You Sent: ___/___/___

Essay Brainstorming

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For each essay you will write for applications, take the time to brainstorm. It's important not to start right in on the final product. Some of the best essays are born through use of this process. Go back later and rank your ideas or mark your favorite(s).

Essay #1

Prompt or Question: _____

Ideas: *(jot down ideas/thoughts freely, to be refined later)*

Rank

Essay #2

Prompt or Question: _____

Ideas: *(jot down ideas/thoughts freely, to be refined later)*

Rank

Essay #3

Prompt or Question: _____

Ideas: *(jot down ideas/thoughts freely, to be refined later)*

Rank

Essay Brainstorming

Application Worksheet

	College Number 1	College Number 2	College Number 3	College Number 4	College Number 5	College Number 6	College Number 7	College Number 8	College Number 9
Applications									
Early Decision Deadline									
Early Action Deadline									
Regular Admission Deadline									
Financial Aid Deadline									
Other Deadline (if applicable)									
Essays ready									
Application Submitted									
Other									
Letters of Recommendation									
Person #1									
Asked if they would write one									
Gave materials to them									
Confirmed done									
Wrote thank you note									
Person #2									
Asked if they would write one									
Gave materials to them									
Confirmed done									
Wrote thank you note									
Person #3									
Asked if they would write one									
Gave materials to them									
Confirmed done									
Wrote thank you note									

Application Worksheet

	College Number 1	College Number 2	College Number 3	College Number 4	College Number 5	College Number 6	College Number 7	College Number 8	College Number 9				
Transcripts													
Required at time of application?													
Gave form to counselor													
Mailed with certificate of mailing or N/A													
Midyear report required?													
Midyear report done													
Test Scores Sent													
SAT													
ACT													
SAT Subject Tests													
AP/IB or Other Tests													
Financial Aid Forms													
FAFSA submitted													
Profile Required?													
Profile Form Submitted													
Other form(s) required?													
Other form(s) submitted													
Financial Aid Offered													
Result (accepted, waitlist, etc)													
Notified School of Decision by 5/1													
Mailed Housing/Other Forms													
Other Checklist Items													

Letters of Recommendation

Always follow your high school's procedure for asking for letters of recommendation from your counselor, teachers, or other staff. However, in most cases, it will be helpful to prepare some information for them. Here are some ideas of what your letter writers might appreciate if your school doesn't specify. Remember that some personnel have access to your transcript, some may not. Also, don't be limited by the lines on this sheet. Prepare this information in a format that represents you well and contains everything you'd like them to know.

Scholastic Information (if they won't have your transcript)

GPA _____ Best SAT Score Total _____ Reading _____ Math _____ Essay _____ Best ACT _____

Sat Subject Tests/Scores: _____

AP/IB or Other Tests/Scores: _____

Resume

If your school doesn't provide a particular format, use the template in the Get in 2 College handbook to create a 1-page resume highlighting your non-scholastic information.

Activities List

If your school doesn't provide a particular format, and the resume format doesn't work well for you, consider providing your Activities Summary from this organizer.

List 3 Words that Best Describe You and Why (use examples)

1. _____
2. _____
3. _____

Educational and/or Career Plans (such as majors, programs, ideal jobs, etc. if not covered elsewhere)

Family Background

Interests (if not covered elsewhere)

Any Obstacles or Hardships Overcome (or anything else you'd like them to be aware of)

List of Schools Applying to and Deadlines (also note if applying early decision or action and those dates)

It is helpful to provide this list on a separate page, showing the dates in chronological order (earliest date first) so that the counselor/teacher can prioritize. Don't include schools that don't want recommendations.

My Results

List your colleges to the left as you hear from them. To the right, check or mark any situations that apply to that school.

College	Accepted Regular Fall	Accepted Deferred	Waitlisted	Not Accepted	Decision Date if other than May 1	Need Another Visit	Still Considering	Notified

Financial Aid

Be sure to use the same name as on your school transcript for your diploma, social security card, driver's license, and all your financial aid forms. The same goes for your address. If there are differences, contact your counselor for advice. Name or address discrepancies can cause significant delays on your applications.

What You Will Likely Need (not all items are applicable to all families)

Driver's license	Investment information
Social Security Number	Mortgage information
W-2 Forms	Bank Statements
Student or parent tax return (if dependent)	Any untaxed income records

Financial Aid Log

FAFSA

FAFSA Website: www.fafsa.gov

FAFSA ID Website: StudentAid.gov/fsaid

FAFSA filing date range ___/___/___ to ___/___/___ (deadline)
Completed FAFSA Form ___/___/___
Submitted FAFSA ___/___/___
Applied for FSA ID ___/___/___
Student FSAID User Name _____ (keep private)
Student FSAID Password _____ (keep private)
Received Student Aid Report (SAR) ___/___/___
My Expected Family Contribution (EFC) is _____

CSS Profile (required by more almost 400 private colleges and has a fee)

Website: <https://cssprofile.collegeboard.org/> or search "CSS Profile"

Profile filing date range ___/___/___ to ___/___/___ (deadline)
Completed Profile Form ___/___/___
Submitted Profile ___/___/___
Profile User Name* _____ (keep private)
Profile Password* _____ (keep private)

**Your user name and password are the ones you set up at www.collegeboard.org*

Grants & Scholarships Log

Use only trusted sources such as Fastweb or others in our handbook to search for scholarships. Be wary of paying for scholarship searches!

Grant / Scholarship Name or Description	Contact, Website, How to Apply, Phone, Mailing Address, Notes, Instructions, etc.	Application Due	Application Submitted	Award / Result
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____
_____	_____ _____ _____	___/___/___	___/___/___	_____

Cost Comparison Worksheet

List your college acceptances across the top of the grid, and the associated costs/aid from each. This will help to consolidate financial comparisons.

	College Number 1	College Number 2	College Number 3	College Number 4	College Number 5	College Number 6	College Number 7	College Number 8	College Number 9
Expenses (annual)									
Tuition and Fees									
Books and Supplies									
Room (Housing)									
Board (Meal Plan)									
Transportation									
Miscellaneous									
Other									
TOTAL (A)	0	0	0	0	0	0	0	0	0
Funds Available (annually)									
Student Contribution									
Parent Contribution									
Grants									
Work-Study									
Scholarships									
Student Loan									
Parent Loan									
Other									
Other									
TOTAL (B)	0	0	0	0	0	0	0	0	0
Annual Funding Gap (A-B)	0	0	0	0	0	0	0	0	0

College Savings: 529 Plans

529 Plans

A 529 Plan is a tax-advantaged education savings plan operated by a state or educational institution designed to help families set aside funds for future college costs. It is named after Section 529 of the Internal Revenue Code which created these types of savings plans in 1996.

What Are the Benefits?

1) Income Tax Breaks

- Although contributions are not deductible, earnings in a 529 plan grow federal tax-free and will not be taxed when the money is taken out to pay for college.
- Other savings vehicles, such as mutual funds, will give up a portion of their earnings to annual income taxes and also get hit with a capital gains tax at time of withdrawal.
- 529 plans have been a huge incentive for Americans to save for college. The tax treatment was made permanent with the Pension Protection Act of 2006.

2) State Tax Breaks May be Available

- In addition to the federal tax savings, 34 states, including the District of Columbia, currently offer residents a full or partial tax deduction or credit for 529 plan contributions.
- You can generally claim state tax benefits each time you contribute to your plan, so it's a smart idea to continue keep making deposits until you've paid your last tuition bill.
- Be sure to research all of your options. If your state doesn't offer benefits for residents, you can choose any other state's plan.

3) You Retain Control

- With few exceptions, the named beneficiary has no legal rights to the funds so you can assure the money will be used for its intended purpose.
- This differs from custodial accounts under UGMA/UTMA, where the child takes control of the assets once he or she reaches legal age.
- A 529 account owner can withdraw funds at any time for any reason; however, keep in mind that the earnings portion of non-qualified withdrawals will incur income tax and an additional 10% penalty tax.

4) Low Maintenance

- A 529 plan is a very hands-off way to save for college - to enroll, simply visit the plan's website or contact your financial advisor.
- Most plans allow you to "set it and forget it" with automatic investments that link to your bank account or payroll deduction plans.

- The ongoing investment management of the account is handled by an outside investment company hired as the program manager or by the state treasurer's office.

5) Simplified tax reporting

- Contributions to a 529 plan do not have to be reported on your federal tax return.
- You won't receive a Form 1099 to report taxable or nontaxable earnings until the year you make withdrawals.
- Deposits to a 529 plan up to \$14,000 per individual per year (\$28,000 for married couples filing jointly) will qualify for the annual gift tax exclusion.

6) Flexibility

- You can change your 529 plan investment options twice per calendar year.
- You can rollover your funds into another 529 plan one time in a 12-month period.
- Hint: There is no federal limit on the frequency of these changes if you replace the account beneficiary with another qualifying family member at the same time.

7) Everyone is eligible to take advantage of a 529 plan.

- Unlike Roth IRAs and Coverdell Education Savings Accounts, 529 plans have no income limits, age limits or annual contribution limits.
- There are lifetime contribution limits, which vary by plan, ranging from \$235,000 - \$400,000.
- Those looking to reduce estate taxes can elect to treat a 529 plan contribution of between \$14,000 and \$70,000 as if it were made over a five calendar-year period to qualify for the annual gift tax exclusion.

State Plans Are Generally Good Anywhere Nationwide

529 Plans can be used to meet costs of qualified colleges nationwide. In most plans, your choice of school is not affected by the state your 529 savings plan is from. You can be a CA resident, invest in a VT plan and send your student to college in NC. Always double check to see if your institution is eligible under 529 rules. There's a misperception that state-sponsored 529 plans are only geared to families that send their children to a state school. Not true.

The Two Types of 529 Plans

1. Savings investment programs
2. Prepaid tuition programs

Both college savings plans and prepaid tuition plans offer significant federal tax advantages. Funds in each type of plan grow tax deferred, and withdrawals from either plan used for the beneficiary's qualified education expenses are completely income tax free at the federal level. But despite these shared tax advantages, college savings plans and prepaid tuition plans are different creatures.

Savings Plans

A college savings plan lets you build an education fund within an individual investment account. Money you contribute is invested in one or more specific investment portfolios. Each portfolio consists of a mix of investments (typically mutual funds) that are chosen and managed exclusively by the plan's designated money manager. You generally pick your investment portfolio at the time you open an account, or else one is automatically chosen for you. Your investment return is not guaranteed.

If you decide to use a 529 savings program, the full value of your account can be used at any accredited college or university in the country (along with some foreign institutions). You can look up eligible institutions online or ask the school directly..

Another advantage to the savings plans is that you can set them up and deposit to them at any time. Also, you can use the funds for expenses other than simply tuition, such as books, room and board, etc. You can also change beneficiaries more readily than with some prepaid plans, so this is another area to scrutinize carefully.

Prepaid Plans

In contrast, a prepaid tuition plan lets you purchase tuition now for use in the future. There are generally two types of prepaid tuition plans: contract plans and unit plans. A contract plan (sometimes known as a guaranteed interest plan) promises to cover a predetermined amount of tuition expenses in the future, in exchange for your lump sum or periodic contributions.

With a unit plan, you purchase a certain percentage of units or credits and the plan guarantees that whatever the percentage of college costs such units cover now, the same percentage will be covered in the future.

For example, assume that 100 tuition credits are required to fund one year's worth of tuition at State University today. You purchase 100 credits today for \$8,000. The result is that when your child starts college at State University in 12 years, your \$8,000 will theoretically pay the entire first year of tuition, even though tuition costs may have risen to \$20,000 per year by then.

Note: Even though prepaid tuition plans typically guarantee your investment return, plans sometimes announce modifications to the benefits they'll pay out due to projected actuarial deficits.

The states offering prepaid tuition contracts covering in-state tuition will allow you to transfer the value of your contract to private and out-of-state schools (although you may not get full value depending on the particular state). The tax law now permits higher education institutions to offer their own 529 prepaid programs. These will allow you to target your tuition prepayment to the sponsoring institution (or group of institutions). The Independent 529 Plan is the only such program currently in operation and you must check to see what restrictions they may place on the colleges covered by the plan.

Getting Started

Step 1: Select a Plan

- Estimate the amount you need to save and narrow down your 529 plan choices. You can research online, but it's a good idea to seek professional advice.
- Decide if you want to purchase your plan through a financial advisor or directly from the plan's website. An advisor-sold plan will cost more, but if you're new to investing you may prefer to work with a professional.
- Find out if your state offers a tax break for residents who use their home state's plan. Be sure to compare your options with out-of-state plans in case you find better investment performance or lower fees elsewhere.

Step 2: Name the Owner and the Beneficiary

- You will name yourself as the owner, but if you are using funds from an existing UGMA/UTMA account you will need to preserve the minor's ownership by designating it as a "custodial 529 account".
- Grandparents or other relatives should be aware that parent or student-owned 529 plans will have a more favorable effect on financial aid eligibility.
- You can name yourself or almost anyone else as the beneficiary. You will have the option of changing the beneficiary to another qualifying family member if the original beneficiary doesn't go to college or has leftover funds in the account.

Step 3: Select Your Investment Option

- If you choose a static investment option, your investments will remain the same over the life of the account, unless you make changes. Portfolio options typically include choices such as: Aggressive Growth, Moderately Aggressive, Moderately Conservative and Conservative.
- Most families prefer age-based portfolios, which are programmed to automatically change over time, shifting investments based on the age of the beneficiary. Accounts for younger children will invest more aggressively and move toward more conservative options as they get closer to college.

Step 4: Make a Deposit

- After you make your initial contribution, you can link your 529 account to your bank account to set up automatic recurring deposits.
- A great way to fund your account is by asking friends and family for contributions in lieu of birthday and holiday gifts.
- Check with your employer to see if they offer payroll deduction as a convenient way to fund your account.

Step 5: Review your account regularly

- Watch for changes in program management and administration fees. These have been going down in recent years, but you'll want to make sure you are paying a fair price.
- Compare your plan's investment performance with other 529 plans or even your retirement account.
- Track your progress toward reaching your goal.

Fees and Expenses

College savings plans, like other types of managed accounts such as mutual funds and annuities, are managed by professional money managers who pass along their investment expenses to account owners. In addition, the plan manager will charge you a fee for administering your account. Both of these fees are usually equal to a percentage of your total account value. Some college savings plans may also tack on a flat annual maintenance fee, though this may be waived if you sign up for automatic payroll deduction or direct debiting of your checking account. Because fees and expenses vary among plans and can affect your account's total return, examine them carefully.

Prepaid tuition plans typically charge a flat enrollment fee at the time you open your account, but generally there are no ongoing charges. However, you may be assessed fees for late payment, returned checks, changing the beneficiary, changing the beneficiary's enrollment date, document replacement, or other administrative matters.

Ask the following questions to help you better compare the fees of college savings plans vs. prepaid tuition plans:

- Is there an application fee, beneficiary substitution fee, or account owner substitution fee?
- What other fees and costs are charged, and what are the amounts?
- Will my fees be less if I contribute through payroll deduction or automatic deduction from my checking account?
- Is there a fee to do a rollover to another state's plan?
- Will I be penalized if I move my account out of the plan within a short time after I open the account? How short a time?
- Is there a fee if I terminate the account?
- Do I pay the fees separately, or is the fee deducted from my account?

A Note About Gift Tax

The gift and estate tax treatment of an investment in a 529 plan is a good news, bad news situation. The bad news is that your contribution is treated as a gift to the named beneficiary for gift tax and generation-skipping transfer tax purposes and so you need to be aware of this exposure, particularly if you are making other gifts to the beneficiary during the same year.

The good news is that your contribution qualifies for the \$14,000 annual gift tax exclusion and so most people can make fairly large contributions without incurring the gift tax.

Incentive to Make Large Up Front Deposits

Even better news is that if you make a contribution of between \$14,000 and \$70,000 for a beneficiary, you can elect to treat the contribution as made over a five calendar-year period for gift tax purposes. This allows you to utilize as much as \$70,000 in annual exclusions to shelter a larger contribution. The money (and the growth of your account) gets out of your estate faster than if you made contributions each year.

Asset Control With Estate Advantages

And the best news is that the asset leaves your estate but doesn't leave your control. This is a truly remarkable benefit when you compare it to the "normal" gift and estate tax laws. Anyone who is being advised to reduce their estate tax exposure through gifting, but cannot stand the thought of irrevocably giving away their assets, can now have the best of both. Of course, if you later revoke the account, its value comes back into your estate. Your estate will also have to include a portion of any contribution made with the five-year averaging election if you don't live past the fourth year.

Interested But Don't Know Where to Start?

If you'd like to find out more, there is a plethora of information on line. However, it can be overwhelming. Perhaps the best approach is to do some preliminary research, then vet your ideas with a qualified professional. US News has established a "529 Finder" tool that offers a good starting point. Use the link below:

<http://money.usnews.com/529s>