

# Student Loan Solutions fact finder

Date \_\_\_\_\_

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_  
Preferred method of contact  Phone  Email  
Date of birth \_\_\_\_\_  
Your Horace Mann representative \_\_\_\_\_

*Prior to meeting with your Horace Mann representative, please:*

- **Obtain your Federal Student Aid (FSA) ID** at fsaid.ed.gov. It may take 48 hours to authorize your account.
- Use your FSA ID to obtain your loan information at nslds.ed.gov. Click on **“MyStudentData Download”** and choose the option to download a document with all of your loan information.
- Don't share your FSA ID with anyone, including Horace Mann.

## Employment information

Occupation \_\_\_\_\_  
School name \_\_\_\_\_  
School district/employer \_\_\_\_\_

How many consecutive years have you worked as a classroom teacher? \_\_\_\_\_

## Household information

How many children, including unborn children, are in your family and receive more than half of their support from you? \_\_\_\_\_

How many people, excluding your spouse and children, live with you and receive more than half of their support from you? \_\_\_\_\_

How do you file taxes?

- Single  Married/Joint  
 Married/Separately  Head of household

Annual adjusted gross income (AGI), **as listed on your most recent tax return**

Individual \$ \_\_\_\_\_  
Household \$ \_\_\_\_\_

## Student loan information

Total federal loan debt \$ \_\_\_\_\_  
Monthly payment \$ \_\_\_\_\_

Total private loan debt \$ \_\_\_\_\_  
Monthly payment \$ \_\_\_\_\_

Highest federal interest rate owed \_\_\_\_\_%

Estimated date of first loan disbursement \_\_\_\_\_

Estimated date of final loan payment \_\_\_\_\_

Are you currently in default?  Yes  No

Spouse's total federal loan debt, *if any* \$ \_\_\_\_\_

Type of loan(s) - *check all that apply*

- FFEL  Direct  Private  
 Parent PLUS  Perkins  Unknown

Current repayment plan(s)

- 10-year level standard  20-, 25-, or 30-year level extended  
 Graduated  Income-driven  Unknown

Have you received Teacher Loan Forgiveness in the past?

- Yes  No

If yes, how much did you receive? \_\_\_\_\_

Do you intend to take out additional student loans in the near future?

- Yes  No  Unknown

## Retirement planning information

Current monthly retirement contributions \$ \_\_\_\_\_

Estimated time until retirement (in years) \_\_\_\_\_

Are you currently contributing to a 403(b) plan?  Yes  No

Does your employer match your 403(b) contributions?

- Yes  No  Unknown

## General information

Do you plan to stay in full-time public service employment for at least the next 10 years?

- Yes  No  Unknown

Please indicate if you would be interested in attending a workshop in the following areas

- DonorsChoose.org  
 State Teachers' Retirement System\*  
 Financial Success  
 Insurance protection (Auto, home, life)

*\*Workshop not available in Utah*