

Confidential Financial Aid &  
College Financial Planning Questionnaire



**COLLEGE IS REALLY EXPENSIVE.**

**COMPLETING THIS FORM WILL  
MAKE IT CHEAPER.**



### Contact and Family Information

Student's Name	
Father's Name	
Mother's Name	
<b>E-Mail Address</b>	
Home Phone	
Cell Phone 1	
Cell Phone 2	

**If the Student's birth parents are divorced**, please complete this form with information about the parent with whom the Student resided/will reside at least 51% of the days of the Student's senior year in high school. IRS tax form Dependency status is irrelevant for financial aid. Please indicate marital status on the page that follows.

Some questions on this form help us determine anticipated financial aid; others assist the illustration of all possible ways to finance college. The more date you provide, the better a job we can do on your FREE analysis.

We will calculate (a) your Expected Family Contribution (EFC), (b) your anticipated financial aid award and Cost of College and (c) your cost to finance an education at your student's colleges. We will also provide (d) four and six-year graduation rates so you can budget for how many years college costs continue. Answers to questions in YELLOW are required but the more info you can provide us, the better results we can provide you.

**Please scan/email it to [answers@educate4less.com](mailto:answers@educate4less.com)**

*or*

**Fax it to 877.638.3573**

*Please list up to 5 colleges to which the student has applied:*

	Full College Name	State
1		
2		
3		
4		
5		

Please Note: We use the Federal and Institutional Methodologies (where applicable) to calculate your estimated EFC and cost of college. By signing below, I acknowledge that the EFC informs me of the financial aid for which I may be *eligible*. Education Funding Solutions, Inc. cannot guarantee the amount or receipt of financial aid as aid is awarded at the sole discretion of the Financial Aid Officer at the student's college of choice.

You may use your first name only on this form (with valid email) and initial below.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

For us to help you save potentially thousands on college, complete this form fully. Estimate amounts for which you do not have statements or tax returns.

Parent Information			
Attend Workshop?	Father	Stepfather	Mother Stepmother
Birth date	___ / ___ / ___		___ / ___ / ___
Work Phone			
Work email			
Income Tax Prep:	___ Self ___ CPA ___ HR Block, etc.		
Self Employed?	Y / N		Y / N

Children's Information				
Child's 1st Name				
Date of Birth				
Your dependent?				
College Start Year				
GPA/SAT or ACT Score	/	/	/	/
Gross Wage	\$	\$	\$	\$
Int/Div Income	\$	\$	\$	\$
Fed. Taxes Paid	\$	\$	\$	\$
Assets	\$	\$	\$	\$
529 Plans / TAP:	\$	\$	\$	\$
UGMA/UTMA	\$	\$	\$	\$

Parent Income (use round numbers)	
Adjusted Gross Income (1040 Line 37)	\$
Father/Stepfather Gross Wages	\$
Mother/Stepmother Gross Wages	\$
Interest/Dividends (1040 Lines 8a+9a)	\$
Tax Exempt Interest (1040 Line 8b)	\$
Annual Retirement Contribution	\$
Total Federal Taxes Paid (1040 Line 61)	\$
Maximum Monthly College Budget	\$

Parent Assets		
Cash and Savings	\$	
Parents Investments (NON Retirement)	\$	
Retirement Investments	\$	
Residence Information	Primary	Second Home
Year Purchased		
Purchase Price	\$	\$
Current Value	\$	\$
Amount Owed (1 <sup>st</sup> , 2 <sup>nd</sup> , Heloc)	\$	\$
Original Mortgage Amount		
Mortgage Payment (Principal & Interest)	\$	\$
Remaining term (in months)	mos.	mos.
Interest Rate	%	%