



Contact and Family Information	
Student's Name	
Father's Name	
Mother's Name	
E-Mail Address	
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 50% of the days of the Student's senior year in high school. IRS tax form Dependency status is irrelevant for financial aid.

We will calculate, **FREE OF CHARGE**, your **Expected Family Contribution** (EFC) and based upon that unique EFC, *your family's* anticipated financial aid award and cost at each of your student's target colleges. To do so, we need this form completed thoroughly.

Please fax it to 877-638-3573
or
 Scan and e-mail it to answers@educate4less.com

Please list up to 5 colleges the student is considering:
 First two are FREE; additional colleges \$9 each

	Full College Name	State
1		
2		
3		
4		
5		

Please Note: We use the Federal and Institutional Methodologies (where applicable) to calculate an estimated EFC. By signing below, I acknowledge that the EFC informs me of the financial aid for which I may be *eligible*. My college planning specialist cannot guarantee my receipt of financial aid, which is awarded at the sole discretion of the Financial Aid Officer at the student's college of choice.

 Signature

 Date

Please complete this form thoroughly but estimate amounts for the figures about which you do not have statements or tax returns.

Personal 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				
College Start Yr.				
Your Dependent?				
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	\$	
<i>Residence Information</i>	<i>Primary</i>	<i>Secondary</i>
Year Purchased		
Purchase Price	\$	\$
Current Value	\$	\$
Amount Owed (1 st , 2 nd , Heloc)	\$	\$
Mortgage Payment (Principal & Interest)	\$	\$
Remaining term (in months)	mos.	mos.
Interest Rate	%	%