

# Personal Financial Aid Analysis


For

Last Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Home Phone: \_\_\_\_\_  
Home Email: \_\_\_\_\_

## Workshop Attended

Location: \_\_\_\_\_  
Date: \_\_\_\_\_

*Dave Landry, presenter*

	<p>Central Mass College Funding Advisors, LLC 290 West Main Street Suite 19 Northborough, MA 01532 508-739-2020 centralmasscfa.com</p> <p>Lowering the cost of Higher Education for over 28 years!</p>
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*Let no child be denied an education  
because of money.*

## Personal Information

Father / Step-Father \_\_\_\_\_ Mother / Step-Mother \_\_\_\_\_  
First Name: \_\_\_\_\_  
Attended Workshop? Yes or No \_\_\_\_\_ Yes or No \_\_\_\_\_  
Year of Birth: \_\_\_\_\_

Do you currently work with a financial advisor or investment broker? Yes No

First Name	Year of Birth	College Start Year
Child #1: _____	_____	_____
Child #2: _____	_____	_____
Child #3: _____	_____	_____
Child #4: _____	_____	_____
Child #5: _____	_____	_____

Other Dependants: \_\_\_\_\_  
*(i.e.: elderly parent, disabled sibling)*

## Primary Residence Information

Year Purchased: \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_

Current Value: \$ \_\_\_\_\_  
*(use Market or Appraised Value - we will compute Table Value for you)*

Amount Owed: \$ \_\_\_\_\_  
*(Total of all mortgages)*

**All information is required to complete analysis. Blanks will be assumed to be \$0 if left blank.**

## Income Information

Use Rounded Numbers or your 2010 Federal 1040 if available.

Adjusted Gross Income (line 37 on 1040) \$ \_\_\_\_\_

Father's/Step-Father's Gross Wage \$ \_\_\_\_\_

Mother's/Step-Mother's Gross Wage \$ \_\_\_\_\_

Int/Div Income (line 8a/9a on 1040) \$ \_\_\_\_\_

Annual Retirement Contribution \$ \_\_\_\_\_

Total Federal Income Tax (line 55 on 1040) \$ \_\_\_\_\_

### Other Income information:

(i.e. Child Support Received, Child Support Paid, Business Loss, Social Security, Disability, Extreme Medical/Dental Expenses)

**Please include AMOUNT AND DESCRIPTION**

\_\_\_\_\_

\_\_\_\_\_

## Asset Information

Checking, Savings, CD's: \$ \_\_\_\_\_

Investments in Parents' Names: \$ \_\_\_\_\_  
(i.e.: Stocks, Bonds, Non-Real Estate, Non-Retirement Investments)

Retirement Savings: \$ \_\_\_\_\_

Net Worth of Business/Farm: \$ \_\_\_\_\_

### Real Estate other than your Primary Residence

(Please use an additional page if you have more than one property)

Year Purchased: \_\_\_\_\_

Purchase Price: \$ \_\_\_\_\_

Current Value: \$ \_\_\_\_\_  
(use Market or Appraised Value - we will compute Table Value for you)

Amount Owed: \$ \_\_\_\_\_

## Children's Information

Child #1    Child #2    Child #3    Child #4    Child #5

Gross Wage: \$ \_\_\_\_\_

Regular Savings: \$ \_\_\_\_\_  
(Exclude tuition savings plans - i.e.: educational savings and/or educational investments.  
Use the next line for those, if any)

Educational: \$ \_\_\_\_\_  
(List Educational Savings Plans, i.e.: UPlan, UFund, 529 plans)

## Divorce Information

Who is the custodial parent? \_\_\_\_\_

Is the mother re-married? \_\_\_\_\_ YES or NO

If yes, does she file jointly with her husband? \_\_\_\_\_ YES or NO

Is the father re-married? \_\_\_\_\_ YES or NO

If yes, does he file jointly with his wife? \_\_\_\_\_ YES or NO

Central Mass College Funding Advisors, LLC uses the Federal and Institutional Methodologies to calculate your Expected Family Contribution (EFC). By signing my name below, I acknowledge that College Funding Advisors, LLC cannot guarantee aid and that aid actually offered is at the discretion of the Financial Aid Director at each college.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Please mail this form to: (or FAX to 508-739-2270)**

Central Mass College Funding Advisors, LLC  
290 West Main Street Suite 19  
Northborough, MA 01532

Phone: 508-739-2020

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