Personal
Financial Aid Analysis

Last Name: _____

Address: _____

City/State/Zip: _____

Phone: _____

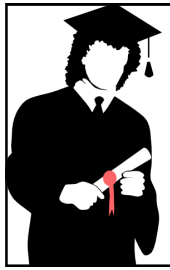
Email: _____

Workshop Attended

Location: _____

Date: _____

Dave Landry, presenter



Central Mass College Funding Advisors, LLC
290 West Main Street Suite 19
Northborough, MA 01532
508-739-2020
centralmasscfa.com

Lowering the cost of Higher Education for over 29 years!

Let no child be denied an education because of money.

Personal Information

	Parent/Step Parent #1	Parent/Step Parent #2
First Name:	_____	_____
Attended Workshop?	Yes or No	Yes or No
Year of Birth:	_____	_____

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

Other Dependents: _____
(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)

Blanks will be assumed to be $0 if left blank.

Income Information

Use Rounded Numbers *or your most recent Federal 1040, if available.*

Adjusted Gross Income *(line 7 on 1040)* $_____

Parent/Step Parent #1 Gross Wage $_____

Parent/Step Parent #2 Gross Wage $_____

Int + Div Income *(lines 2b + 3b on 1040)* $_____

Annual Retirement Contribution $ _____

Total Federal Income Tax *(line 15 on 1040)*$_____

Other Income information:
(*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:$_____
(*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 - educational savings and/or educational investments. Use the next line for those, if any)

Educational: $	_____	_____	_____	_____	_____

(List Educational Savings Plans, UPlan, UFund, 529 plans)

Divorce Information

Who is the custodial parent? _____

Is Parent #1 re-married? YES or NO

If yes, does Parent #1 file jointly with their spouse? YES or NO

Is Parent #2 re-married? YES or NO

If yes, does Parent #2 file jointly with their spouse? 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 College Funding Advisors, LLC cannot guarantee aid and 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

Blanks will be assumed to be $0 if left blank.