

FREE FAFSA FILING PREP

FOR FREE, The RETIREMENT DREAM FOUNDATION (RDF) will calculate (a) Expected Family Contribution (EFC), (b) Anticipated financial aid award and cost of college, (c) Cost to finance an education at your student's colleges and (d) 4-year and 6-year graduation rates.

We will also provide **FREE** an Answer Key to FAFSA questions, based upon information you provide us, so you can simply go to fafsa.ed.gov and input the Answers in the appropriate places or file a paper FAFSA. The free Filing prep will require additional, more detailed information from you.

Some questions on this form help us determine anticipated financial aid; others assist the illustration of all possible ways to finance college. All information is kept confidential and using your last name is optional for this initial information.

The **FREE REPORT** will be delivered to your valid email address.

Answers to questions in **YELLOW** are the minimum required.
The more info you provide us, the better results we can provide.

Please scan/email completed form to
answers@retirementdreams.org
or fax it to 877.638.3573



RETIREMENT
DREAM
FOUNDATION

A NJ 501(c)3 Not-for-Profit

The Retirement Dream Foundation (RDF) is a 501(c)3 non-profit organization focused on helping families afford both college and retirement. Because college funding is complicated, we offer **FREE** workshops/webinars and **FREE** FAFSA review/filing. Visit www.retirementdreams.org for details.

Parent First Name	
Parent Last Name	
E-Mail Address	
Phone	
College 1	
College 2	
College 3	

If the Student's birth parents are divorced, 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.

RDF uses the Federal Methodology to calculate your estimated EFC and cost of college. By initialing below, you acknowledge that the Retirement Dream Foundation (RDF) cannot guarantee the amount or receipt of financial aid that is awarded at the discretion of individual college Financial Aid Officers. You must provide a valid email and initial below for your **FREE** Report.

Initials

Date

Parent Income	
Adjusted Gross Income (1040 Line 37)	\$
Father/Stepfather Wages	\$
Mother/Stepmother Wages	\$
IRA, 401k, Pension Contribution Total	\$
Total Dividends, Interest, Tax-Free Interest	\$
Federal Taxes Paid 2011 (1040 Line 61)	\$

Child Information			
Child First Name			
College Start Mo/Yr			
Adjusted Gross Income	\$	\$	\$
Federal Taxes Paid	\$	\$	\$
Bank Balance	\$	\$	\$
529 Plan Balance	\$	\$	\$
Trust Balance	\$	\$	\$

Parent Assets	
Bank Balance Total	\$
Investments (NOT Retirement Accounts)	\$
Retirement Plan Balance Total	\$

Residence Information		
Year Purchased		
Purchase Price	\$	\$
Current Market Value	\$	\$
Mortgage Balance (1st, 2nd, Home Equity)	\$	\$
Original Mortgage Amount	\$	\$
Mortgage Payment (Principal & Interest)	\$	\$
Remaining Term (In Months)		
Interest Rate		
What is the maximum monthly amount you could comfortably pay for college?	\$	