

Complimentary Consultation Checklist:

The following items will help us in assessing your college financial aid needs. In order to make our meeting as valuable as possible, kindly bring them to your consultation.

1. List of schools student is considering.
2. Most recent Federal Tax Returns & W-2, 1099 and income statements.
3. Most recent pay stubs.
4. Most recent account statements:
 - Retirement & Non-Retirement
 - Children's Accounts
 - Life Insurance
 - Mortgages & Home Equity Loans
 - Other Financial Obligations (Car Loans, Credit Cards, etc.)
5. Confidential Profile Forms.

CLIENT PROFILE**PARENT 1 INFORMATION**

Name:		Driver's License #:	
Date of Birth:	SSN:	Email:	
Current Address:			
Home Phone:	Cell Phone:	Work Phone:	
Employer:	Position:	Income:	Years:
Date of Marriage or Divorce:		Mother's Maiden Name:	
Level of School Completed: High School / College / Beyond		City You Were Born:	

PARENT 2 INFORMATION

Name:		Driver's License #:	
Date of Birth:	SSN:	Email:	
Current Address: (if different than above)			
Home Phone:	Cell Phone:	Work Phone:	
Employer:	Position:	Income:	Years:
Date of Marriage or Divorce:		Mother's Maiden Name:	
Level of School Completed: High School / College / Beyond		City You Were Born:	

FAMILY MEMBER INFORMATION

Name:	Date of Birth:	SSN:	School and Grade:

HOME INFORMATION

Monthly Mortgage Payment:	Mortgage Amount:
Purchase Price:	Year Purchased:
Current Market Value:	Other Real Estate:

BUSINESS INFORMATION

Name:	Start Date:	Value:
Address:		
Number of Employees:	Percent Ownership:	Amount Owed:

RETIREMENT INFORMATION

Parent 1	Contributions:	Balance:
Parent 2	Contributions:	Balance:

LIFE INSURANCE INFORMATION

Parent 1	Type:	Face Amount:	Cash Value:	Premium:
Parent 2	Type:	Face Amount:	Cash Value:	Premium:

ASSET INFORMATION

Savings:	Checking:	Investments:
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ACCOUNTANT INFORMATION

Name:	Phone:		
Address:			
Date:	Fee:	Renewal Per Child:	Source:

STUDENT PROFILE

Name:	
Date of Birth:	SSN:
Current Address:	
Email:	Cell Phone:
Driver's License Number:	Mother's Maiden Name:
Current High School:	Guidance Counselor:

STUDENT LOG INS

College Board Username:	Password:
TAP Username:	Pin:
FSA ID Username:	Password:
College Website Username:	Password:

PARENT LOG INS

Parent 1 FSA ID Username:	Password:
Parent 2 FSA ID Username:	Password:

COLLEGE LIST

School:	Scholarship \$:	EA or ED:	CSS Profile:	FAFSA Filing Deadline:
1.				
2.				
3.				
4.				
5.				
6.				
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10.				
11.				
12.				
13.				
14.				
15.				
16.				
17.				
18.				
19.				
20.				

STUDENT FINANCIAL INFORMATION

Will you file a tax return: Yes or No	Income:
Assets:	529 Plan / UTMA:

TEST SCORES & MAJOR

SAT:	ACT:	GPA:	Rank:	Major:
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