



COLLEGE FINANCIAL STRATEGIES

PARENTS INFORMATION (ESTIMATES ARE FINE) DO NOT PROVIDE ANY SOCIAL SECURITY NUMBERS

PARENTS' NAME(S)		STUDENT'S NAME	
ADDRESS		CITY, STATE, ZIP	
PHONE NUMBER		AGE OF OLDER PARENT	
TOTAL ANNUAL INCOME		SALES VALUE OF HOME	
ANNUAL CONTRIBUTION TO RETIREMENT ACCOUNTS		PURCHASE PRICE & PURCHASE YEAR OF HOME	
FEDERAL INCOME TAX PAID LAST YEAR		CURRENT BALANCE OF MORTGAGE	
TOTAL RETIREMENT ASSETS (401K, IRA, ANNUITIES, ETC.)		AMOUNT OF MONTHLY PRINCIPLE & INTEREST PAYMENT	
TOTAL NON-RETIREMENT ASSETS (CASH, SAVINGS, MUTUAL FUNDS, STOCKS, ETC.)		WHEN WAS MORTGAGE PUT TOGETHER & THE TERMS OF THAT MORTGAGE?	
HOW MUCH IS THE PARENT WILLING TO CONTRIBUTE MONTHLY TO THE STUDENT'S EDUCATION? Please insert \$\$ amount		NUMBER OF FAMILY MEMBERS	
ESTIMATED ANNUAL MEDICAL AND DENTAL EXPENSES		ESTIMATED BUSINESS VALUE	
- FATHER'S BIRTHDATE - MOTHER'S BIRTHDATE - DATE OF MARRIAGE		NUMBER OF STUDENTS THAT WILL BE IN COLLEGE THE YEAR WE WILL BE ASSISTING	
CASH VALUE LIFE INSURANCE AMOUNT OF COVERAGE / CASH ACCUMULATED VALUE	_____	TERM LIFE INSURANCE AMOUNT OF COVERAGE	

LIST OF BALANCE & PAYMENT ON ANY OTHER DEBTS (CREDIT CARDS, LOANS, ADDITIONAL MORTGAGE, ETC.)

BALANCE	PAYMENT	TYPE OF DEBT	BALANCE	PAYMENT	TYPE OF DEBT
1)			5)		
2)			6)		
3)			7)		
4)			8)		

INFORMATION FOR ALL CHILDREN IN HOUSEHOLD (Please use second sheet if needed)

CHILD NAME	BIRTHDATE	YEAR OF GRADUATION	STUDENT'S ANNUAL INCOME	AMOUNT OF ASSETS
1)				
2)				
3)				

COLLEGES OF INTEREST

1)	4)	7)
2)	5)	8)
3)	6)	9)