

Family Information

Parents Names: _____

Student Name: _____ HS Graduation Yr: _____

Home Address: _____

Parent's Phone: _____ Parent's Email: _____

School Name: _____

Student's GPA: _____ Class Rank: _____

SAT/ACT Score: _____ Sibling Name(s) and Grade(s): _____

General Questions

What prompted you to book a college planning analysis with us?

What are your main goals for your family in the college planning process?

Please describe your greatest challenges in reaching your college planning goals.

What resources are you currently using to achieve your goals? _____

Are your resources working? Yes No Why or why not? _____

Student Questions

	YES	NO
Have you decided on a career after college?		
Do you know in which subject you'd like to major at college?		
Do you know the best ways to research colleges?		
Do you know how to create your "best fit" college list?		
Have you ever been on at least 3 official college tours?		
Have you made contact with any college recruiters or reps?		
Are you involved in any extracurricular activities?		
Are you completing an average of 100 hours of community service per year?		
Do you have good study habits?		
Do you have a 3.5 GPA or above?		
Are you in the top 10% of your high school class?		
Do you have at least 1200 (combined Reading and Math) on the SAT?		
Do you have at least a 27 on the ACT?		
Do you know how to complete a college application?		
Do you plan to apply to college Early Action/Early Decision?		
Do you know how to craft favorable college essays?		
Would you consider yourself to be a leader?		
TOTAL		

***If you have more than 5 "No's," you may need some help with student planning.*

Parent Questions

	YES	NO
Do you know how to apply for need-based financial aid?		
Do you know how to apply for merit-based financial aid?		
Do you know your family's Expected Family Contribution (EFC)?		
Do you know the strategies to lower your EFC (if possible)?		
Have you previously completed a FASFA?		
Have you previously completed a CSS Profile?		
Have you previously completed the IDOC?		
Have you previously gone through a financial aid appeal process?		
Do you know how to read a financial aid award letter?		
Do you have \$140,000 per child to pay the cost of a degree at a state school?		
Do you have a plan to come up with \$140,000 per child?		
<i>**if you have more than 4 "No's," you may need some help with financial aid.</i>	TOTAL	

	YES	NO
Do you have an Adjusted Gross Income (AGI) of over \$160,000?		
Do you have assets (Checking, Savings, CD's, Stocks, Mutual Funds, Cash, etc.) totaling more than \$30,000?		
Do you have retirement assets (401k, 403b, IRA, SEP, Roth IRA, Annuity, etc.) totaling more than \$150,000?		
Do you own rental properties, commercial properties, second homes, etc.?		
Do you have more than \$50,000 in equity in your primary residence?		
Do you have custodial accounts (529 Plans, UGMAs, UTMA's, etc.)?		
Are you a W-2 wage earner?		
Do you have a trust?		
<i>**if you have "Yes" more than 3 times, you may need some help with funding.</i>	TOTAL	

To ensure our service is impeccable, our office can only take on 3-4 new clients per month. Why do you feel you would be a good fit for our company?
