



Meeting With:

Meeting Date \_\_\_/\_\_\_/\_\_\_  
Meeting Time \_\_\_:\_\_\_ AM PM  
Meeting Location:

**To make this first meeting most beneficial, please bring the following items:**

- Most recently filed W-2, 1099 or other records of earned income for student and parents
- Most recently filed federal income tax records for student and parents
- Records of untaxed income such as welfare, social security, AFDC or ADC, veterans benefits for student and parents
- Current bank statements
- Current mortgage information, including original purchase price of home, current market value, amount owed, amount of monthly payment and yearly total taxes paid
- Business and farm records
- Record of stocks, bonds and other investments, including retirement accounts and life insurance policies
- Copy of FAFSA if previously completed for any children

**Family Information**

Father's Name \_\_\_\_\_  
Mother's Name \_\_\_\_\_  
Children's Names / Birthdays \_\_\_\_\_ / \_\_\_\_\_  
\_\_\_\_\_ / \_\_\_\_\_  
\_\_\_\_\_ / \_\_\_\_\_

**Student Information**

Student's Name \_\_\_\_\_  
High School \_\_\_\_\_  
Grade / Graduation Yr \_\_\_\_\_ / \_\_\_\_\_  
GPA / ACT Score / SAT Score \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
Expected College Major \_\_\_\_\_  
Colleges or universities student is interested in attending  
1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_  
4. \_\_\_\_\_  
5. \_\_\_\_\_  
6. \_\_\_\_\_

**\*\* Two rescheduled appointments without 24-hr notice will result in a \$150 consultation fee\*\***

## **Paying for College Pain Chart**

*Please rank each option from 1 – 9. 1 is your most desirable way to pay and 9 is the most painful way to pay.*

Savings / CDs / Bonds \_\_\_\_\_

Parents' Cash Flow (income) \_\_\_\_\_

Borrow / Loans (parents' names) \_\_\_\_\_

Home Equity \_\_\_\_\_

Merit Based Scholarships \_\_\_\_\_

Need Based Aid \_\_\_\_\_

Borrow / Loans (student's name) \_\_\_\_\_

Student Employment \_\_\_\_\_

Grandparents / Trusts \_\_\_\_\_