

Walk-In Data Form

Let's get started and set-up an account

Parent 1 Name

First*

Last*

Parent 2 Name

First

Last

Address

City

State

Zip Code*

Email*

VIP Code

Tell us a little about your child

Student's Name

First*

Last*

Student's Gender*

Male

Female

Graduation Year*

State student lives in*

Zip Code student lives in*

Family Makeup

How many family members live in the household?*

Are [student]'s parents still married?*

Yes

No

How many parents live in the student's household?*

How many OTHER students in household are currently enrolled in college?*

What struck a nerve with you from my workshop and caused you to take this meeting today?

When you say (PRICE, COST), what specifically does that mean to your family?

Do you feel you're ahead behind, or right where you should be?

Why and what have you done so far to make you feel that way? (essays done, resume polished)

- This consultation could take 1 - 1 ½ hours depending on your situation.

- It's broken into 2 parts - 1) to gather info about your child/finances, 2) to calculate your projected cost of college & determine if there's a fit.

- Our services aren't always a fit for every family & we're very candid about who we can help & who we can't.

- My job is to qualify your family to to see if you're a good fit for our services.

- We'll only work with those families that we know we can make a major impact on their situation.

- At the end of this meeting, we'll determine if your family is a fit or not & decide together what the next steps will be.

- Does that sound fair?

Ok great - one more question before we get started - are you ok with me telling you the things you 'need' to hear versus telling you things you 'want' to hear?

Tell Us About Your Child's Academics

What High School does Student attend?

Is this High School public or private?

How many Students per grade?

How many guidance counselors / grade?

What is your opinion of them?

How many times have you met?

What is Student's GPA? (4.0 scale)*

What is Student's Rank in the class?

How many AP/Honors classes is Student enrolled in?

Who advised them on how many AP/Honors class to take?

What test did Student score higher on, ACT/SAT?*

What was the Student's highest composite score?*

What was the Student's highest composite score?*

How many times is Student planning on taking/retaking the SAT/ACT?

Who has advised them on taking/retaking the SAT/ACT?

Did the Student take any prep or plan on taking any prep

How Knowledgeable are you about admission processes?* 1-10

Has student built a solid college list yet?

Yes

No

What are Student's Top 3 school's*

Any of these Student's Dream College?

Other colleges considered?*

Are these schools set-in-stone?

Yes

No

How knowledgeable are you about the schools that might be the best for Student?* 1-10

Why these?

Have you had the chance to visit these schools?

Yes

No

How far is Student willing to travel to school?*

Any specific major in mind? (Desired Major)*

How sure is [student] about [major] as a major?* 1-10*

Why these?

What do you see Student studying in college?

What does Student do outside the class that matches their passion for (Major)

Has Student done any volunteer work (mandatory, comm serv.)?

Is Student a member of any school clubs or groups?

Has Student taken any leadership roles outside the classroom?

Does Student play any sport?

Students Financial Profile

Does Student Work?

Yes No

What was Students Adjusted Gross Income for the last calendar year?*

\$

How much did Student pay in federal & State taxes last year?*

\$

Does Student have an ownership stake in a business?*

Yes No

How much does Student have in cash and investments (in personal name)?*

\$

Family Financial Profile

Do you have a 529 for Student?*

Yes No

How much is the current account worth?

\$

How much do you save for college each month? (529 or other)?*

\$

What are your current occupations?

Self-employed?*

Yes No

How long have you worked there?

Concerns about future employment?

What is your previous calendar year's household Adjusted Gross Income (AGI)?*

\$

In the previous calendar year, what is the approximate amount of untaxed income? (ex. Child support, disability)?*

\$

Last year, what is the approximate amount paid in Federal and State taxes?*

\$

What is your average monthly take home after taxes? (including alimony, child support, etc...)?*

\$

What is your total non-retirement investments (do not include 401k, 403b, annuities etc...)?*

\$

Out of the previous #, how much is earmarked for college?*

\$

Do you have retirement accounts?

What is the value of retirement accounts?

\$

How much do you contribute monthly?

Does your company match?

Yes No

Home Related Expenses

Do you own a house or rent?

What is your current home value?*

\$

How much do you owe in total mortgages liens in your primary residence?*

\$

What is your monthly payment on primary mortgage (Principal and Interest)?*

\$

What is your monthly payment on any additional liens on your primary mortgage(2nd mtg or lines of credit)?*

\$

What is your current mortgage interest rate? (1st lien)

%

What is your current loan term? (1st lien)

What year did you take out the loan? (1st lien)

What is your annual cost for Real Estate taxes?*

\$

What is your annual cost for Homeowner's insurance?*

\$

What's your total monthly utility expenses (gas, water, electric, etc...)?*

\$

What is your total monthly cost for cable, internet and home phone?*

\$

Car And Insurance Related Costs

What is your total monthly car payments?*

What is your annual cost for auto insurance?*

What is your total monthly cell phone payments for your household?*

What is your monthly payments for household student credit cards?*

What is your total monthly payments for student loans?*

What is your monthly payments for any additional loan payments?*

If you buy health insurance (outside of employer), what is the annual cost (premium only)?*

If you care for relatives outside your home what is your monthly payment?*

Do you currently have life insurance?

Permanent or term?

Cash value amount?

Annual Premium?

College Prep for Parents

How knowledgeable are you about financial aid options?*

 1 10

How knowledgeable are you about college grants & scholarships?*

 1 10

How knowledgeable are you about best ways to complete Financial aid paperwork?*

 1 10

How knowledgeable are you about loan options?*

 1 10

Are you open to Student taking student loans in their name?

With colleges costing between \$25k-\$70k per year, walk me through your current plan to pay the bill.

If you were going to contribute to college monthly WITHOUT changing your current lifestyle, how much would you be willing to contribute

Where is that current cashflow going?

