

Complimentary Consultation Worksheet

Family Name: _____

Day Phone: _____

E-Mail: _____

Mother

Name: _____

DOB: ___/___/___

Date of State Residence: ___/___/___

Education Level: _____

Marital Status:

Married: Date: ___/___/___

Separated

Divorced

Widowed

Single

Father

Name: _____

DOB: ___/___/___

Date of State Residence: ___/___/___

Education Level: _____

Other Children:

Child Name	DOB
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_____	___/___/___
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_____	___/___/___
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_____	___/___/___
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_____	___/___/___
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Do you Support others:

Grandparent

Niece/ Nephew

Student

Name: _____

DOB: ___/___/___

Date of State Residence: ___/___/___

High School: _____

GPA: _____ ACT _____

Extra Curricular Activities:

Community Service

Athletics

Honor Roll, Clubs, Organizations

Career: _____

Colleges: _____

Parent Income

Occupation Mother: _____ Father: _____
Employer Mother: _____ Father: _____
401(k) Contributions: Mother: _____ Father: _____
IRA Contributions: Mother: _____ Father: _____
Parents Total Income _____ Last Year's AGI: _____
Social Security Income: _____ Parents Net Other Income: _____
Income Tax Paid: _____ Itemized Deductions: _____

Parent Assets:

Retirement Balances:

401(k): Mother: _____ Father: _____ IRA Mother: _____ Father: _____
Roth IRA Mother: _____ Father: _____

Non Retirement Balances:

Savings: _____ Checking: _____ CD'S: _____
Mutual Funds: _____ Brokerage Accounts: _____ Life INS Cash Value: _____

Parent Consumer Debt Balance Interest Rate Monthly Payment

Credit Card: _____
Vehicle Loans _____
Student Loans _____

Parent Properties Home Value Purchase Price Payment & Terms 1st Mortgage 2nd Mortgage Date Purchased

Primary Residence	Home Value	Purchase Price	Payment & Terms	1st Mortgage	2nd Mortgage	Date Purchased
Property 1						
Property 2						

Student Income:

Last Year's Earned Income: _____
Last Year's AGI: _____

Student Assets:

Savings: _____ CD'S: _____
529 Plan: _____ UTMA: _____
Mutual Funds: _____ Savings Bonds : _____