

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
------------	-----

_____	___/___/___
-------	-------------

_____	___/___/___
-------	-------------

_____	___/___/___
-------	-------------

_____	___/___/___
-------	-------------

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: _____

<u>Parent Consumer Debt Balance</u>	<u>Interest Rate</u>	<u>Monthly Payment</u>
-------------------------------------	----------------------	------------------------

Credit Card: _____		
--------------------	--	--

Vehicle Loans _____		
---------------------	--	--

Student Loans _____		
---------------------	--	--

<u>Parent Properties</u>	<u>Home Value</u>	<u>Purchase Price</u>	<u>Payment & Terms</u>	<u>1st Mortgage</u>	<u>2nd Mortgage</u>	<u>Date Purchased</u>
--------------------------	-------------------	-----------------------	----------------------------	---------------------	--------------------------------	-----------------------

Primary Residence						
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 : _____