

Basic Information

Today's Date: _____

Client Name: _____ Client Name #2: _____

Address: _____

Phone Number: _____ Email Address: _____

Preferred Method of Contact: Phone E-mail

Do you intend to use any savings for private (elementary/high) school tuition? Yes No

If yes, describe amounts and dates needed: _____

Do you intend to move to another state prior to the child's first year of college? Yes No

If yes, to which state? When?

Child #1 Information

Child's name: _____ Amount currently saved: _____

Year child expects to enter college: _____ Current savings description: _____

Expected number of years in college: _____ Regular savings amount: _____

Portion of costs you wish to cover with savings: _____ % Monthly Quarterly Annually

Type of costs you wish to cover with savings:

State undergraduate school	State graduate school	Tuition
Private/Ivy undergraduate school	Private/Ivy graduate school	Room, board, & fees

Name(s) of any school(s) in mind: _____

Additional Notes/Comments: _____

Child #2 Information

Child's name: _____ Amount currently saved: _____

Year child expects to enter college: _____ Current savings description: _____

Expected number of years in college: _____ Regular savings amount: _____

Portion of costs you wish to cover with savings: _____ % Monthly Quarterly Annually

Type of costs you wish to cover with savings:

State undergraduate school	State graduate school	Tuition
Private/Ivy undergraduate school	Private/Ivy graduate school	Room, board, & fees

Name(s) of any school(s) in mind: _____

Additional Notes/Comments: _____