

After filling out the appropriate fields, either print the form and fax to 212.868.3140 or click "Save As" to create a new PDF and email directly to [aclearwaters@clarityinv.com](mailto:aclearwaters@clarityinv.com).

## Basic Information

Today's Date: \_\_\_\_\_

Client #1 Name: \_\_\_\_\_ Client #2 Name: \_\_\_\_\_

Address, City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Preferred Method of Contact:      Phone      Email

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: \_\_\_\_\_