



# Prospect Data Form

College & Retirement Solutions  
667 Shunpike Rd, Suite 3  
Chatham, NJ 07928  
Phone: (973) 514-2002  
Fax: (973) 514-1101

By completing this form, your consultation with us will be more informative and thorough. Having an overall snapshot of your financial situation and your child's academic pursuits allows us to present a clearer picture of your college funding options.

General Information	
Student's Name/Age/Grade:	
Sibling's Name/Age/Grade:	
Parents Name/Age:	
Contact Numbers:	H# C#
	W# (Mom) W# (Dad)
Parent's Marital Status:	
Do you own your home?	
How would you describe your credit rating?	Excellent / Good / Fair / Poor
Number in Household:	
# Pre-College children:	
Number in College at least 1/2 time for at least one semester in the 2011-2012 school year: (do not include parents):	

Student Academic Information	
SAT Verbal/Critical Reading:	
SAT Math:	
SAT Writing:	
ACT:	
Class Rank:	
GPA:	

Student's College Choices	
College/University:	City/State
Types of schools younger siblings are interested in or potentially going to attend. If none, then the planning for those children will be the same as the student we are planning for.	

If investment, financial or insurance planning and/or products are required, College and Retirement Solutions, LLC may refer you to one of its affiliates, including The Ziering Insurance Agency. Any discussion of the Tax implications of planning is strictly for general purposes. Neither "CRS" nor its representatives may give specific tax advice. One should seek the advice and counsel of their accountant and/or tax advisor for information regarding their particular situation.



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Financial Information	
Student's Earned Income:	\$
Student's Unearned Income:	\$
Interest, Dividends, etc.	\$
Student's Adjusted Gross Income:	\$
Father's Earned Income: Box 5, W-2	\$
Mother's Earned Income: Box 5, W-2	\$
Parent's Other Taxable Income: (Business, Self-Employment, or Sched. C)	\$
IRA Contributions:	\$
Contributions to Retirement Accounts: 401(k)403(b), etc.	\$
Parent's Adjusted Gross Income:	\$
Itemized deductions: IRS Form 1040-Line 40	\$
Other Untaxed Income: (Retirement Contributions, Untaxed Pension, Etc.)	\$
Total Income Tax: IRS Form 1040-Line 60	\$
How much can you comfortably contribute to your student's college expenses monthly?	\$
Elementary/Secondary School Tuition	\$
<b>For the student-</b>	\$
Parent's contribution:	\$
Tuition scholarships/grants:	\$
<b>All other siblings-</b>	\$
Parent's contribution:	\$
Tuition scholarships/grants:	\$
Child Support Paid:	\$
Child Support Received:	\$

Assets: Home	
Purchase Price	\$
Year of Purchase	
Present Value	\$
Additional Real Estate Value	\$

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Asset Information Summary			
	Parents	Student	Siblings
Cash, Checking, Savings	\$	\$	\$
Certificates of Deposit	\$	\$	\$
Treasury Bills	\$	\$	\$
Money Market Funds	\$	\$	\$
Mutual Funds	\$	\$	\$
Stocks	\$	\$	\$
Bonds	\$	\$	\$
Tax Exempt Bonds	\$	\$	\$
Annuities	\$	\$	\$
Trust Funds	\$	\$	\$
Limited Partnerships	\$	\$	\$
Business Assets	\$	\$	\$
Farm Assets	\$	\$	\$
Pre-paid Tuition Accts	\$	\$	\$
Other Assets	\$	\$	\$
Cash surrender value of life insurance	\$	\$	\$

Liabilities (Debt)		
Type	Monthly Payment	Current Balance
1st Mortgage	\$	\$
2nd Mortgage	\$	\$
Home Equity/Line of Credit	\$	\$
Car Loans	\$	\$
Credit Cards	\$	\$
Other Debt	\$	\$
Life Insurance Premium	\$	\$

Retirement Asset Information		
Type	Father	Mother
IRA	\$	\$
401(k)	\$	\$
403(b)	\$	\$
Pension Fund	\$	\$
Annuities (qualified)	\$	\$
Rollover	\$	\$
Keogh/SEP/Simple	\$	\$
Monthly Contribution (% or amount)	\$	\$
Employer Match (% or amount)	%	%

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