CONFIDENTIAL FAMILY INFORMATION

COLLEGE WORKSHOP COMPLIMENTARY CONSULTATION WORKSHEET

PARENT: ______________________ AGE: ______________________

PARENT: ______________________ AGE: ______________________

STUDENT(S) NAME: ______________________ AGE/GRADE: ______________________

STANDARDIZED TESTS SCORES (PSAT/SAT/ACT): ______________________

EXTRA CURRICULAR ACTIVITIES:

____

____

PREFERRED FIELD OF STUDY: ______________________

TOP CHOICES FOR COLLEGE

1. ______________________ 2. ______________________

3. ______________________ 4. ______________________

DO YOU HAVE ANY ADDITIONAL CHILDREN? IF SO, NAMES AND AGES?

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PLEASE PROVIDE ANY OTHER RELEVANT INFORMATION ABOUT YOUR STUDENT(S) BELOW

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BARNUM FINANCIAL GROUP | Center for College Planning

BARNUM FINANCIAL GROUP'S CENTER FOR COLLEGE PLANNING

6 Corporate Drive, Shelton, CT 06484

WITH ADDITIONAL OFFICES THROUGHOUT THE TRI-STATE AREA

T: (203) 513-6318 | **F:** (203) 513-6080

COLLEGE@BARNUMFG.COM | WWW.BARNUMFORCOLLEGE.COM

CONFIDENTIAL FINANCIAL INFORMATION

COLLEGE WORKSHOP COMPLIMENTARY CONSULTATION WORKSHEET

PARENT INCOME

NAME: ______________________ NAME: ______________________

EMPLOYMENT/OTHER INCOME: ______________________ EMPLOYMENT/OTHER INCOME: ______________________

PENSION/SOCIAL SECURITY: ______________________ PENSION/SOCIAL SECURITY: ______________________

PARENT/STUDENT ASSETS

**Types Include: Savings/Brokerage Accounts, CDs, Stocks, Bonds, Mutual Funds, IRAs, 529s, UTMA/ UGMA, 401(k), 403(b)/TSA, Pension, Annuities, Life Insurance Cash Values*

Account Owner	*Account Type	Account Value

PROPERTY/DEBT

**Types Include: Mortgage, HELOC, Car Loans, Student Loans, Credit Cards, Personal Debt*

*Type	Property Value ($)	Debt Amount ($)	Rate (%)	Income (Monthly %)