



# College Zoomer™

## Personal Information

	Client 1 (C1)			Client 2 (C2)		
Name						
Date of Birth	/	/	Gender <input type="checkbox"/> M <input type="checkbox"/> F	/	/	Gender <input type="checkbox"/> M <input type="checkbox"/> F
Employment Income	\$			\$		
Marital Status				State of Residence		

## Children Attending College

Name: Child 1	Date of Birth	Name: Child 2	Date of Birth	Name: Child 3	Date of Birth
	/ /		/ /		/ /

## College Goal

Importance High Low 10 ↔ 1	Who is attending college?	Start Year	No. of Years	Target Amount		Notes - prepaid years - scholarship / loans
				Own Estimate or Type	Use the Amount for a Specific College	
8	<i>e.g., Susan</i>	2020	4		State University	\$1,000/yr scholarship

Type of Average Annual College Costs (as of Dec 2011)					
Average All	\$26,832	Public In-State (4 yrs)	\$20,339	Public In-State (2 yrs)	\$14,637
Private (4 yrs)	\$40,476	Public Out-of-State (4 yrs)	\$32,329	Public Out-of-State (2 yrs)	\$22,912

## Investment Assets Identify the resources you have to fund your college goals.

Description	Child 1		Child 2		Child 3	
	Value	Additions / Yr	Value	Additions / Yr	Value	Additions / Yr
529 Plan	\$	\$	\$	\$	\$	\$
Coverdell Account	\$	\$	\$	\$	\$	\$
Other	\$	\$	\$	\$	\$	\$

## Risk Score

How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score?

Client 1	Client 2

Two thirds of all investors score between 40 and 60, and only 1 in 1000 select a score lower than 20 or greater than 80. Does your score feel right as you compare yourself to others?

	Men			Women		
Age Group	> 64	50-64	< 50	> 64	50-64	< 50
Avg Score	50	54	59	45	48	52