



# Solutions For College Funding

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## QUICKPLAN SUMMARY

Complete form & return by fax, e-mail or mail to the address listed above; **2 days prior** to consultation.

Student Name \_\_\_\_\_

Student Grade \_\_\_\_\_ Parent Names \_\_\_\_\_

# Family Members: In Household \_\_\_\_\_ In College (Fall 2017) \_\_\_\_\_ (Fall 2018) \_\_\_\_\_ (Fall 2019) \_\_\_\_\_

Age: Oldest Parent \_\_\_\_\_ Age: All Pre-College Siblings \_\_\_\_\_

<u>Income &amp; Assets</u>	<u>Parent's</u>	<u>Student</u>
Adjusted Gross Income (Form 1040, Line 37)	_____	_____
Total Earned Income - Wages, salaries, etc. (Form 1040, Line 7)	_____	_____
Untaxed Income – child support; welfare; social security benefits; housing allowance; pensions received	_____	_____
Federal Income Tax Paid (Form 1040; Line 56) do not include SE tax	_____	_____
Total Assets & Investments <u>except</u> Retirement Plans (Checking, Savings, CD's, Stocks, Money Markets, Mutual Funds, Bonds,[Student include Trusts])	_____	_____
Equity in Property other than Principal Residence Is it Rental Property? _____	_____	_____
If own a Business - % Own _____ # Employees _____ (Net Assets of Business)	_____	_____

Home: Purchase Price \_\_\_\_\_ Year Bought \_\_\_\_\_  
Present Market Value \_\_\_\_\_  
Total Debt Against the Home (All Mortgages & Lines of Credit) \_\_\_\_\_

Parent's Yearly Tax Deductible Contributions to  
Retirement Fund (IRA, 401k, 403b, 408k, 414h, 457b, 501c) \_\_\_\_\_

One or both parents:	Parents of student are:
_____ are self-employed	_____ married _____ remarried
_____ own a business	_____ divorced _____ separated
_____ own or live on a farm	_____ single parent _____ widowed

Colleges of Interest: