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Dear Parents,

Thank you for attending our college planning workshop. We hope it was beneficial and that you were able to take away valuable information. Our next step is to provide you with a one hour, complimentary consultation where you can ask questions, where we will show you what financial information is impacting your situation, and where we will discuss positioning your student for the best opportunity. At the end of that meeting we will take a few minutes to show you how our company could help your family. Again, this is a free meeting as part of the Partners in Education Program.

Please take the time to fill out the enclosed data form in its entirety **before our first meeting**. From this information, we can then calculate your Expected Family Contribution (EFC) to determine how much financial aid you may be eligible to receive. We can then discuss options for you to save for college, maximize aid eligibility, position your family and point your student in a direction to be able to receive as much gift-aid as possible.

It is essential to have the data form ready for us at your first appointment. If you have further questions, please don't hesitate to call. We look forward to seeing you again soon.

Sincerely,

Stuart and David

Your Peachtree College Planning Team,

David Hughes
Stuart Canzeri
Teresa Venturo
Dawn Patterson
Roberto Lorena

Section 1: General Student Information

1. Student's First Name: _____
2. Nick Name: _____
3. Middle Initial: _____
4. Student's Last Name: _____
5. Gender: Male / Female
6. Student's Date of Birth: (Month/Day/Year) __ __ / __ __ / __ __
7. Student's Social Security No: _____ - _____ - _____
8. Student's Home Telephone: (_____) _____ - _____
9. Student's Cell Phone: (_____) _____ - _____
10. Student's email: _____
11. Student's State of Legal Residence: _____
12. Date student began living in State of Legal Residence: (Month/Day/Year) __ __ / __ __ / __ __
13. What is the student's expected graduation date?: (Month/Year) __ __ / __ __

Section 2: Student's Information: Academic/Social

1. What high school does the student attend?: _____
2. What is the student's class rank?: _____
3. Has the student taken the SAT/PSAT test? Yes \ No Critical Reading
4. Has the student taken the ACT test? Yes \ No Composite Score: _____
5. What is the student's grade point average?: _____ Weighted: _____ Unweighted: _____
6. Student's major course of study in college: _____
7. Student's choice of career: _____
8. Is the student taking any AP/Honors/Advanced/IB courses? Yes \ No
9. If yes, list courses: _____

10. List Extra-Curricular activities (Sports/Charity/Musical/Other): _____

Section 3: Goals and Important Questions

Please consider all areas and then rank your personal concerns on a scale of 1-8 in order of greatest importance to least. 1 holds the most concern, 8 the least. Use a different number for each area.

- Achieving Financial Security for Retirement _____
- Increasing Cash Flow/Reducing Debt _____
- Selecting the Right College for Your Student _____
- Paying off Your Mortgage _____
- Sheltering/Liquidating Existing Assets _____
- Student Borrowing/Working _____
- Help Filling out Financial Aid Forms _____
- Protecting Your Resources _____

Other potential concerns/questions: _____

Section 4a: Sibling Information

SIBLING NAME	DATE OF BIRTH	RELATIONSHIP TO THE STUDENT	GRADUATION DATE	CURRENT SCHOOL
1. _____	___/___/___	_____	_____	_____
2. _____	___/___/___	_____	_____	_____
3. _____	___/___/___	_____	_____	_____
4. _____	___/___/___	_____	_____	_____

Section 4b: Student College Selections

<u>COLLEGE/UNIVERSITY NAME</u>	<u>CITY & STATE</u>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Section 5: Parent/Family General Information

FATHER'S (STEP)

MOTHER'S (STEP)

1. First Name: _____ Code: _____ First Name: _____ Code: _____

Code: (1) Parent (2) StepParent (3) Guardian (4) Other

2. Father's Nick Name: _____

Mother's Nick Name: _____

3. Last Name: _____

Last Name: _____

4. Father's Age: _____ yrs. old

Mother's Age: _____ yrs. old

5. Date of Birth: ___/___/___

Date of Birth ___/___/___

6. Father's SS#: _____

Mother's SS#: _____

7. Home Mailing Address: _____

8. City: _____ State: _____ Zip Code: _____

9. Employer: _____

Employer: _____

Self Employed Y / N | Company: LLC / C Corp / S Corp

Self Employed Y / N | Company: LLC / C Corp / S Corp

10. Job Title: _____

Job Title: _____

11. Work Phone #: _____

Work Phone #: _____

12. Father's Cell #: _____

Mother's Cell #: _____

13. Father's Highest Grade Level: Code: _____

Mother's Highest Grade Level: Code: _____

Code: (1) Elementary (2) High School (3) College or beyond

14. Number of Family Members in your family. _____

15. Number of Family Members (*excluding parents*) who will be college students. _____

16. Number of Dependents: _____

17. Marital Status: Married / Divorced / Single 18. Date of marriage: ___/___/___

19. Are you a US Citizen? Yes / No 20. If No, what is your visa status: _____

FATHER'S (STEP)

MOTHER'S (STEP)

21. Email: _____ Email: _____

22. Will your income change next year? Yes / No

23. If yes, please explain?

24. Special circumstances on income or family situation that we should know about (Receive stock options, disabilities, etc):

Section 6: Parent/Family Income Information

Please use most recent tax information available

INCOME SOURCES

Skip if you provide your tax return

	PARENT(S)	STUDENT
1. The following Income figures are from which tax form: (1) 1040 (2) 1040A (3) 1040 EZ (4) 1099 (5) None (6) Foreign Tax Return	_____	_____
2. Filing Status: (1) Single (2) Head of Household (3) Married Filing Separate Return (4) Married Filing Joint Return	_____	_____
3. Tax Year of Tax Return used	_____	_____
4. 1040 A or 1040EZ Eligible	Yes / No	Yes / No
5. Number of Exemptions: (1040 line 6d, 1040A 6d)	_____	_____
6. Medicare Wages Father/Student: (W2 Box 5)	\$ _____ .00	\$ _____ .00
7. Medicare Wages Mother: (W2 Box 5)	\$ _____ .00	\$ _____ .00
8. Taxable Income Father/Student: (W2 Box 1)	\$ _____ .00	\$ _____ .00
9. Taxable Income Mother: (W2 Box 1)	\$ _____ .00	\$ _____ .00
10. Contribute to Retire Father: (W-2 Box 12 Code D,E,F,G,H,S)	\$ _____ .00	\$ _____ .00
11. Contribute to Retire Mother: (W-2 Box 12 Code D,E,F,G,H,S)	\$ _____ .00	\$ _____ .00
12. Interest Income (1040 8a, 1040A 8a)	\$ _____ .00	\$ _____ .00
13. Tax Exempt Interest Income: (1040 8b, 1040A 8b)	\$ _____ .00	\$ _____ .00
14. Dividend Income: (1040 9, 1040A 9)	\$ _____ .00	\$ _____ .00
15. Other Taxable Income/(Loss): (1040 Lines, 10-11,13, 14, 19,21,*1040A 10,11B,12B,14B* 1040EZ 3)	\$ _____ .00	\$ _____ .00
16. Business Net Income (Loss): Father/Student (1040 12 – Schedule C)	\$ _____ .00	\$ _____ .00
17. Business Net Income (Loss): Mother/Student (1040 12 – Schedule C)	\$ _____ .00	\$ _____ .00
18. IRA Distributions: (1040 15A)	\$ _____ .00	\$ _____ .00
19. Taxable Portion: (1040 15B)	\$ _____ .00	\$ _____ .00
20. Pension Distributions: (1040 16A)	\$ _____ .00	\$ _____ .00
21. Taxable Portion: (1040 16B)	\$ _____ .00	\$ _____ .00
22. Net Income (Loss): Parent/Student Real Estate: (1040 17- Schedule E)	\$ _____ .00	\$ _____ .00
23. Net Income (Loss): Parent/Student: Partnerships/ S-Corps (1040 17- Schedule E)	\$ _____ .00	\$ _____ .00
23A. Net Income (Loss): Father/Student: Farm (1040 18- Schedule F)	\$ _____ .00	\$ _____ .00
23B. Net Income (Loss): Mother/Student: Farm (1040 18- Schedule F)	\$ _____ .00	\$ _____ .00

Skip if you provide your tax return

24. Unemployment Compensation (1040 19, 1040A 13)	\$ _____ .00	\$ _____ .00
25. Social Security Benefits: (1040 20A*1040A 14A)	\$ _____ .00	\$ _____ .00
26. Taxable Portion: (1040 20B*1040A 14B)	\$ _____ .00	\$ _____ .00
27. IRA Deductions: (Self-employed SEP, Simple, & Keogh- 1040 28 & 32* 1040A 17)	\$ _____ .00	\$ _____ .00
28. Adj to Income (1040 36 minus 28 & 32, 1040A 20)	\$ _____ .00	\$ _____ .00
29. Adjusted Gross Income (1040 37*1040A 21*1040EZ 4)	\$ _____ .00	\$ _____ .00
30. Itemized Deductions: (1040 40)	\$ _____ .00	\$ _____ .00
31. Education Credit: (1040 49, 1040A 31)	\$ _____ .00	\$ _____ .00
32. Fed Income Tax pd: (1040 55, 1040A 35 1040EZ 10)	\$ _____ .00	\$ _____ .00
33. Earned Income Credit: (1040 64A*1040A 38a)	\$ _____ .00	\$ _____ .00
34. Additional Child Tax Credit: (1040 65)	\$ _____ .00	\$ _____ .00
<u>UNTAXED INCOME:</u>		
35. Child Support RECEIVED for all Children:	\$ _____ .00	\$ _____ .00
36. Annual Housing Allowance:	\$ _____ .00	\$ _____ .00
37. Worker's Compensation:	\$ _____ .00	\$ _____ .00
38. Veterans Benefits:	\$ _____ .00	\$ _____ .00
39. Welfare Benefits:	\$ _____ .00	\$ _____ .00
40. Grant & Scholarship Aid (Reported in AGI)	\$ _____ .00	\$ _____ .00
41. Federal Work Study	\$ _____ .00	\$ _____ .00
42. Credit Special Fuels:	\$ _____ .00	\$ _____ .00
43. Foreign Income Exclusions:	\$ _____ .00	\$ _____ .00
44. Other Untaxed Income:	\$ _____ .00	\$ _____ .00
<u>EXPENSES:</u>		
45. Medical/Dental Expenses:	\$ _____ .00	\$ _____ .00
46. Annual K-12 Tuition:	\$ _____ .00	\$ _____ .00
47. Number of Students paid for: (Exclude Student)	\$ _____ .00	\$ _____ .00
48. Annual Child Support PAID for all Children:	\$ _____ .00	\$ _____ .00
49. Monthly Rent Payment:	\$ _____ .00	\$ _____ .00

Section 7: Assets Information

CASH	Parent(s) Value	Debt** (Pledged, borrowed or margined)	Student (s) (Please Include UGMA's) Value
1. Cash or Checking Account:	\$_____ .00	\$_____ .00	\$_____ .00
2. Savings Account:	\$_____ .00	\$_____ .00	\$_____ .00
3. Money Market Funds:	\$_____ .00	\$_____ .00	\$_____ .00
4. Certificates of Deposit:	\$_____ .00	\$_____ .00	\$_____ .00
Monthly Savings Amount: \$_____ .00 monthly into checking, savings or money market			

INVESTMENTS

5. T-Bills:	\$_____ .00	\$_____ .00	\$_____ .00
6. Bonds/ Tax Exempt Bonds:	\$_____ .00	\$_____ .00	\$_____ .00
7. Stocks:	\$_____ .00	\$_____ .00	\$_____ .00
8. Mutual Funds/ETFs:	\$_____ .00	\$_____ .00	\$_____ .00
9. Custodial UGMA/UTMA	\$_____ .00	\$_____ .00	\$_____ .00
10. Trust Funds	\$_____ .00	\$_____ .00	\$_____ .00
11. Limited Partnerships:***	\$_____ .00	\$_____ .00	\$_____ .00
12. Other:	\$_____ .00	\$_____ .00	\$_____ .00

EDUCATION ASSETS

13. Education IRA/Coverdell ESA:	\$_____ .00	\$_____ .00	\$_____ .00
14. 529 College Savings Accounts:	\$_____ .00	\$_____ .00	\$_____ .00

Do you contribute monthly to any Education accounts? Y / N If Yes, what is monthly contribution: \$_____ .00

SIBLINGS ASSETS

15. Total Assets UGMA/UTMA (Sibling)	\$_____ .00	\$_____ .00	\$_____ .00
16. 529 Savings Plan (Sibling)	\$_____ .00	\$_____ .00	\$_____ .00

BUSINESS/ FARM ASSETS

17. Business Assets:***	\$_____ .00	\$_____ .00	\$_____ .00
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*****If you had to sell or liquidate in 30 days what is the business or limited partnership worth.**

18. Farm Assets:	\$_____ .00	\$_____ .00	\$_____ .00	\$_____ .00
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RETIREMENT ASSETS

	FATHER	MOTHER
19. 401K or 403B (Total Balance)	\$_____ .00	\$_____ .00
<i>Do you contribute monthly to your 401K or 403B? Y / N If Yes, Annual Amt:</i>	\$_____ .00	\$_____ .00
<i>Does your employer match your contributions? Y / N If Yes, Annual Amt:</i>	\$_____ .00	\$_____ .00
20. IRA- Traditional (Total Balance)	\$_____ .00	\$_____ .00
21. IRA- ROTH (Total Balance)	\$_____ .00	\$_____ .00
22. Annuity (Total Balance)	\$_____ .00	\$_____ .00

Section 9: General Information on Life Insurance

	FATHER	MOTHER
1. How much life insurance does each parent have?	Personal: \$ _____ .00	\$ _____ .00
	Thru Work: \$ _____ .00	\$ _____ .00
2. What type of insurance does each parent have? (1) Term (2) Whole Life (3) Universal Life (4) Variable Life	_____	_____
3. Is there cash value on these policies?	Yes / No	Yes / No
4. If YES, what is the cash value of the policies?	\$ _____ .00	\$ _____ .00
5. How much do you pay per month for life insurance coverage?	\$ _____ .00	\$ _____ .00

GRANDPARENT(S) GENERAL INFORMATION

1. Have the Grandparents expressed an interest of helping with the expenses of college? Yes / No
If YES, what amount will the Grandparents give towards a college education? \$ _____ .00
2. Is there an Estate pending: Yes / No
3. Might your family inherit money while your students are in college: Yes / No

Section 10: Divorced / Separated / Remarried Parent Only

1. Year of Separation: _____ Year of Divorce: _____
2. Other Parent's Name: _____
3. Other Parent's Address: _____
4. Other Parent's Employer: _____
5. According to court order, when will support for the student end? (mm/dd/yr) ___/___/___
6. Who last claimed the student as a tax exemption? _____
(Identify the appropriate parent/guardian by name.)
7. In which year was the student last claimed? _____
8. Is there an education clause (agreement) in the divorce decree? Yes / No
9. If YES, how much per school year? \$ _____ .00

Section 11: Signature

PLEASE SIGN & DATE THIS COLLEGE FINANCIAL AID DATA FORM

My family has submitted this information for financial aid purposes. Each item can be substantiated by IRS records or other documents. This information is accurate and complete to the best of my knowledge.

Parent Signature

Date