

College Zoomer

Short Description



Personal Information

| | Client (C) | Co-Client (Co) |
|---------------------------------------|--|--|
| Name | | |
| Gender | Male Female | Male Female |
| Date of Birth | / / | / / |
| Email Address | | |
| Employment Status | Employed Retired Business Owner Homemaker | Employed Retired Business Owner Homemaker |
| Employment Income | \$ | \$ |
| Other Income (non-investment only) | \$ | \$ |
| Marital Status | | State of Residence |

Important relationships

Any children, grandchildren or participant to include in this plan.

| Name | Date of Birth | Relationship |
|------|---------------|--------------|
| | / / | |
| | / / | |
| | / / | |
| | / / | |
| | / / | |
| | / / | |

College Goal

| Who is attending college? | Start Year | # of Years | Target Amount | | Notes |
|---------------------------|------------|------------|----------------------------|---------------------------------------|---|
| | | | Enter Own Estimate or Type | Use the Amount for a Specific College | • prepaid years • scholarship • loans |
| e.g., Susan | 2022 | 4 | | State University | \$1,000/yr scholarship |
| | | | | | |
| | | | | | |
| | | | | | |

Investment Assets

Identify the resources you have to fund your college goals.

| Participant Name | 529 Plan | Coverdell Account | Other |
|------------------|----------|-------------------|-------|
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |
| | \$ | \$ | \$ |

Outside Assets

Assets owned by other (account owned by child or relative) in attendees name.

| Participant Name | Description | Value | Additions |
|------------------|-------------|-------|-----------|
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |
| | | \$ | |

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? If you're not sure, go ahead and guess. You can always talk with your advisor and revise if needed.

| Client | Co-Client |
|--------|-----------|
| | |

Often college savings funds are invested differently from a retirement portfolio. For this reason, it is here that we ask for a risk score that applies only to the handling of your college savings funds.



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