



Personal Information

	Client (C)				Co-Client (Co)			
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	# 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>	2022	4		<i>State University</i>	<i>\$1,000/yr scholarship</i>

Average Annual College Costs*

Average All	\$37,798	Public In-State (4 years)	\$24,061	Public In-State (2 years)	\$16,833
Private (4 years)	\$47,831	Public Out-of-State (4 years)	\$38,544	Public Out-of-State (2 years)	\$26,719

*Data Source: Peterson's Undergraduate and Graduate Institution Databases, copyright 2015. Peterson's, Nelnet, LLC. All rights reserved.

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

Description	Child 1		Child 2		Child 3	
	Value	Annual Additions	Value	Annual Additions	Value	Annual Additions
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?

Household	Client	Co-Client

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?

	Household			Men			Women		
Age Group	> 64	50-64	< 50	> 64	50-64	< 50	> 64	50-64	< 50
Avg Score	47	50	54	50	54	59	45	48	52

