



*“Making College Affordable, One Family at a Time”*

Dear Parent(s):

Congratulations on taking the first step towards making your child’s dream come true while making the cost affordable!

Please complete the questionnaire located on the back. It is important to complete this prior to your meeting so that we can discuss your personal situation.

Based on the questionnaire, we will discuss:

- What your family should do to find the right fit colleges and increase your acceptances to your dream colleges
- How to properly strategize to increase your child’s chances of getting accepted into their dream colleges
- We will show you our proven system to get your child motivated, inspired, and passionate toward the right careers that are in high demand.
- How your income and/or assets will affect qualifying for grants and scholarships
- Find out the possible mistakes you are making in the admissions and financial aid process
- Learn where you should focus your time and energy in the college planning process to receive the best outcome in admissions, financial aid, and funding
- Learn the #1 mistake on funding college that can potentially cost you thousands of dollars in education debt
- Learn our proprietary system to graduate in 4 years or less and ensure your child gets a high paying job out of college
- We will share our college planning roadmap that we have been using since 2005 with over 7,500 families in our program
- We will help answer your biggest questions, challenges and concerns that is making you lose sleep at night
- And so much more...

**To get the most out of your one-on-one zoom session, we HIGHLY recommend both parents and your child to attend the session.**

If you do not complete the questionnaire or a family member can’t attend, we will kindly reschedule your appointment.

We take your child’s future and your finances very seriously and want to make the biggest impact in your session.

Please keep in mind, all your information stays strictly confidential and only used to help you solve your biggest college planning challenges, concerns, and questions.

We are blessed to have met you and can’t wait to serve your family!

Please email your questionnaire to [support@collegeplanningexperts.com](mailto:support@collegeplanningexperts.com). For any questions, please give us a call at 818-201-4847.

**COLLEGE PLANNING CONSULTATION QUESTIONNAIRE**

<b>Father's Name:</b>				<b>Phone #:</b>	<b>Email:</b>
<b>Mother's Name:</b>				<b>Phone #:</b>	<b>Email:</b>
<b>Address:</b>					
<b>Marital Status:</b>	Single	Married	Separated/Divorced		Widowed

Please list all Dependents in your household						
<b>Student Name #1:</b>						
Age	School Name	HS Grad Year	GPA	Class Rank	SAT Scores: Reading/Math/Subject	ACT Scores: English/Math/Reading/Science
<b>Student Name #2:</b>						
Age	School Name	HS Grad Year	GPA	Class Rank	SAT Scores: Reading/Math/Subject	ACT Scores: English/Math/Reading/Science
<b>Student Name #3:</b>						
Age	School Name	HS Grad Year	GPA	Class Rank	SAT Scores: Reading/Math/Subject	ACT Scores: English/Math/Reading/Science
<b>Student Name #4:</b>						
Age	School Name	HS Grad Year	GPA	Class Rank	SAT Scores: Reading/Math/Subject	ACT Scores: English/Math/Reading/Science

STUDENT QUESTIONS	YES	NO
Have you decided on a career after college?		
Do you know in which subject you'd like to major at college?		
Do you know the best ways to research colleges?		
Do you know how to create your "best fit" college list?		
Have you been on at least 3 official college tours?		
Have you made contact with any college recruiters or reps?		
Are you involved in any extracurricular activities?		
Are you completing an average of 100 hours of community service per year?		
Do you have good study habits?		
Do you have a 3.5 G.P.A. or above?		
Are you in the top 10% of your high school class?		
Do you have at least a 1200 (combined Reading & Math) on the SAT?		
Do you have at least a 27 on the ACT?		
Do you know how to complete college applications?		
Do you plan to apply to college Early Action/ Early Decision?		
Do you know how to craft favorable college essays?		
Would you consider yourself to be a leader?		
**If you have more than 5 "No's," you may need some help with student planning.	<b>TOTAL</b>	

<b>PARENT QUESTIONS</b>	<b>YES</b>	<b>NO</b>
Do you know how to apply for need-based financial aid?		
Do you know how to apply for merit-based financial aid?		
Do you know your family's Expected Family Contribution (EFC)?		
Do you know the strategies to lower your EFC (if possible)?		
Have you previously completed a FAFSA?		
Have you previously completed a CSS Profile?		
Have you previously completed the IDOC?		
Have you previously gone through a financial aid appeals process?		
Do you know how to read a financial aid award letter?		
Do you have \$150,000 per child to pay the cost of a degree at a state school?		
Do you have a plan to come up with \$150,000 per child?		
** If you have more than 4 "No's, • you may need some help with financial aid.	<b>TOTAL</b>	
	<b>YES</b>	<b>NO</b>
Do you have an Adjusted Gross Income (AGI) of over \$160,000?		
Do you have assets (Checking, Savings, CO's, Stocks, Mutual Funds, Cash etc.) totaling more than \$30,000?		
Do you have retirement assets (401k,403b, IRA, SEP, Roth IRA, Annuity, etc.) totaling more than \$150,000?		
Do you own rental properties, commercial properties, second homes, etc.?		
Do you have more than \$50,000 in equity in your primary residence?		
Do you have custodial accounts (529's, UGMA's, UTMA's, etc.)?		
Are you a W-2 wage earner?		
Do you have a trust?		
** If you "Yes" more than 3 times, you may need some help with funding.	<b>TOTAL</b>	

<b>Assets</b>				
<i>Please list approx. balance in each account</i>				
<b>Savings/Checking</b>	<b>CD</b>	<b>Money Market</b>	<b>401k, 403b, IRA, TSA</b>	<b>Stocks/Bonds</b>
<b>Mutual Funds/Brokerage</b>	<b>Other</b>	<b>Life Insurance</b>	<b>Annuities</b>	<b>Student Assets</b>

<b>Real Estate</b>		<b>Please list total Consumer Debt</b>	
<i>List primary &amp; investment properties</i>			
<b>Primary Home Value</b>	<b>Debt 1st &amp; 2nd</b>		
<b>Investment Home Value</b>	<b>Debt 1st &amp; 2nd</b>	<b>Annual Household Income</b>	
		<b>Husband</b>	<b>Wife</b>

			<b>Other</b>	<b>Student</b>
<b>In the last 7 years have you had any of the following:</b>			<b>Do you own a business?</b>	
BK	Foreclosure		Yes	No
Repossession	Short Sale			
Property Liens				

**GENERAL QUESTIONS**

What prompted you to book a college planning analysis with College Planning Experts?

What are your main goals for your family in the college planning process?

Please describe your greatest challenges in reaching your college planning goals.

What resources are you currently using to achieve your goals?

Are your resources working?    Y        N        Why or why not?

What concerns you the most about college?

What is your biggest college admissions challenge?

What are your biggest financial aid goals and challenges?

How do you plan to fund the cost of college?

To ensure our service is impeccable, College Planning Experts can only take on 6-8 new clients per month. Why do you feel you would be a good fit for our company?

Thank you for taking the time to fill this out! We look forward to meeting you and your family