

# PRELIMINARY EDUCATIONAL PLANNING ANALYSIS

## PARENTS' INFORMATION:

Father's Name \_\_\_\_\_

Father's Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_ Tax Filing Status: \_\_\_\_\_

Mother's Name \_\_\_\_\_

Mother's Age: \_\_\_\_\_ Marital Status: \_\_\_\_\_ Tax Filing Status: \_\_\_\_\_

How do you plan to pay for college? \_\_\_\_\_

| Other Family Members:<br>First Name | Age | College Year | Will you use student loans?<br>Yes /No |
|-------------------------------------|-----|--------------|----------------------------------------|
| 1.                                  |     |              |                                        |
| 2.                                  |     |              |                                        |
| 3.                                  |     |              |                                        |
| 4.                                  |     |              |                                        |

## PARENTS' INCOME:

2013 Estimated Income (AGI): \$ \_\_\_\_\_  
(Or last reported)

## STUDENT'S INCOME:

2013 Estimated Income (AGI): \$ \_\_\_\_\_  
(Or last reported)

## STUDENTS' ASSETS:

Savings: \$ \_\_\_\_\_ Savings: \$ \_\_\_\_\_ Savings: \$ \_\_\_\_\_

529 Plan: \$ \_\_\_\_\_ 529 Plan: \$ \_\_\_\_\_ 529 Plan: \$ \_\_\_\_\_

## PARENTS' ASSETS:

Checking/Savings/CDs: \$ \_\_\_\_\_

Stocks/Funds/Other: \$ \_\_\_\_\_

401k/403b: \$ \_\_\_\_\_

IRAs: \$ \_\_\_\_\_

Home Value \$ \_\_\_\_\_

## OTHER REAL ESTATE:

Current Value: \$ \_\_\_\_\_

Current Debt: \$ \_\_\_\_\_

## BUSINESS:

Do you own your own business? Yes No

Sole Proprietor Corp.

Business / Farm Value: \$ \_\_\_\_\_

Business / Farm Debt: \$ \_\_\_\_\_

## PARENTS' DEBTS

1<sup>st</sup> Mortgage \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

2<sup>nd</sup> Mortgage/HELOC \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

Credit Card 1 \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

Credit Card 2 \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

Installment Debt \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

Auto Loan 1 \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_

Auto Loan 2 \$ \_\_\_\_\_

Type \_\_\_\_\_ % Rate \_\_\_\_\_ Mo. Pmt \$ \_\_\_\_\_