**Scholar Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Current School Level**:  \_\_\_ Middle \_\_\_High school \_\_\_ Undergraduate \_\_\_Graduate

**No. Years Before Attending College**: \_\_\_\_\_\_\_   **College Funding Stage**: \_\_\_\_\_\_\_\_\_\_\_\_

**Type of College/Institution Planning to Attend**:

* Vocational/Trade school
* Two-year College
* Four-year College
* Graduate School (Master/Doctorate)

**Type of Scholar Funding Support** (Financial Aid Status):

* Independent (no parental help)
* Parental/Guardian support (parental help)

**Academics, Strengths, and Interests**

1. What is your current GPA? \_\_\_\_\_\_\_\_\_

2. What are your current college admissions test scores?

* PSAT \_\_\_\_\_\_
* SAT \_\_\_\_\_\_
* ACT \_\_\_\_\_\_
* LSAT \_\_\_\_\_\_
* GMAT \_\_\_\_\_\_
* GRE \_\_\_\_\_\_
* MCAT \_\_\_\_\_\_
* Other \_\_\_\_\_\_

3. What activities and clubs have you been involved in over the last three years? \_\_\_\_\_

4. What specific talents or interests do you have? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**General College Plan**

1. Which type of college do you plan to attend? (check all that apply)

* Public, in-state
* Public, out-of-state
* Private

2. What college(s) do you have in mind? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. What college major(s) are you considering? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Do you plan to live on campus or off-campus? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Do you intend to play collegiate sports? \_\_\_\_\_\_\_\_\_   If so, which sport(s)? \_\_\_\_\_\_\_\_\_

**Household Finance**

1.What is your (or parents) current household income? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. Do you (or your parents) currently have a college savings plan? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. If you had to start paying for college next month, how much money would you (or your parents) be able to pay out of pocket? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Rank your college funding concerns in order of importance:

* Increasing cash flow/reducing debt
* Selecting the right college
* Paying off the mortgage or other debt
* Keeping, spending, or selling existing assets
* Student loan borrowing/working
* Helping fill out financial aid forms
* Protecting your resources
* Searching and applying for scholarships
* Achieving financial security for retirement

5. Do you need additional college funding assistance? \_\_\_\_\_\_\_ If yes, what type of assistance do you need? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_