



Family Funding Plan Worksheet

GENERAL INFORMATION

Yes No

Financial Advisor

Notes

GENERAL INFORMATION

Tax or CPA

Refund or Pay (fed)

Will/Trust

College Plan

Parent goals for this meeting:

1.

Need Help?

2.

College Dollars?

3.

% College Debt-to Student

Death Benefit on Parents

COLLEGE-BOUND STUDENT

GPA

ACT

SAT

Name

Age

Grade

School

SIBLINGS

Name

Age

Grade

School

Name

Age

Grade

School

Name

Age

Grade

School

Non-Academic Involvement

Housing

Circle: On or Off Campus

Major

Target Institutions

Career

Asset 1

Amount

Asset 2

Amount

Asset 3

Amount

Income

Amount

Income 2

Amount

Income 3

Amount

Three Financial Goals:

EFC

X

College Years

=

Min OOP

EFC

/

Months

=

Mthly Funding Need

PARENT 1 NAME AGE EMPLOYER YEARS

INCOME BONUS OTHER

PARENT 2 NAME: AGE EMPLOYER YEARS

INCOME BONUS OTHER

ASSETS

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

RETIREMENT

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

DEBTS

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

Type Amount Contribution Note

HOME

Value

Mortgage Balance Rate Term Payment Extra

Mortgage Balance Rate Term Payment Extra

Other Notes