



Short Form Confidential Questionnaire

(Estimated Time to Complete – 23 mins, 37 seconds)

Student Information

Student's Name _____

Student's Date of Birth _____

Student's E-mail Address _____

Student's Phone Number _____

School Currently Attending/GPA (Core, Weighted & Un-weighted) _____

Best SAT/ACT scores and dates taken _____

When Student Begins 2019-2020 School Year, What Grade Will S/He Be in (High School Senior, College Freshman, etc.) _____

Colleges you're applying to (use separate page if needed): _____

Note - All matters are discussed with the utmost discretion and everything between us is strictly confidential.

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Parent One Information – If student does not live with one parent, please indicate so by writing “Non-Custodial” next to parent’s name.

Parent’s Name _____

Parent’s Primary & Secondary Phone _____

Parent’s Primary Email Address _____

Parent’s Date of Birth _____

Parent’s Address _____

Highest Level of Education Completed _____

Please circle: Married/Remarried? Divorced? Single? Date of marriage/divorce _____

2019 W-2 Income _____ 2019 Other Income (Specify) _____

Estimated 2020 W-2 Income _____ Estimated 2020 Other Income (Specify) _____

Parent Two Information

Parent’s Name _____

Parent’s Date of Birth _____

Parent’s Primary & Secondary Phone: _____

Parent’s Primary Email Address: _____

Parent’s Address _____

Highest Level of Education Completed _____

Circle: Married/Remarried? Divorced? Single? Widowed? Date of marriage/divorce _____

2019 W-2 Income _____ 2019 Other Income (Specify) _____

Estimated 2020 W-2 Income _____ Estimated 2020 Other Income (Specify) _____

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Student Financial Information

Student Adjusted Gross Income (Line 37 on 1040 tax return) 2019, if any_____

Estimated Student AGI (Line 37 on 1040 tax return) 2020, if any_____

Balance of Student Bank Accounts (checking/savings) _____

Balance of Student College Funds (529, Prepaid) _____

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Parent Financial Information

Adjusted Gross Income (Line 37 on 1040 tax return) 2019_____

Number of Family Members _____

Number of Family Members in College (2020-21)_____

Self Employed: Yes No (Circle One)

Balance of Bank Accounts (Checking, Savings, CDs): _____

Balance of All Investment (brokerage) Accounts (do NOT include retirement) _____

Retirement Account Balances (401K, 403B, IRA, etc.): Parent 1 _____

Parent 2 _____

Value of INVESTMENT Real Estate properties (not your primary residence)_____

Balance of Mortgage(s) owed against INVESTMENT properties _____

Value of your **Primary Residence** _____ Mortgage Balance_____

Year purchased _____ Price Paid _____ Monthly Payment (P+I)_____

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Financial Planning Information – The college problem does not exist in a vacuum – please answer these short questions so that we can make sure we understand the whole picture and make appropriate recommendations.

Your biggest financial concerns/questions keeping you up at night _____

Before hearing about us, what was your plan to pay for college? _____

Describe the main thing(s) you'd hope to accomplish by engaging us if we each decide to work with one another:

Any other important information you want us to know? _____

Please complete each question above. You may answer "N/A" if any is not applicable to your situation.

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Please bring the following items to your appointment:

- Copy most recent personal tax return
- Copy most recent corporate tax return, if self-employed
- Copy of your most recent bank statements, each bank account
- Copy of your most recent investment account statement – including retirement accounts
- Copy of 529 savings plans and FL Prepaid Statements
- Any other relevant financial information (relating to income and assets)
- Any student information you think relevant – grades, transcripts, standardized test scores, awards, etc.

Looking forward to meeting you!

Sincerely,

A handwritten signature in blue ink that reads "Peter Ratzan". The signature is written in a cursive style.

Peter Ratzan
College Funding Specialists
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Weston, FL 33326
954-659-1234