

# College Zoomer



Personal Information

	Client (C)	Co-Client (Co)
Name		
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	<input type="checkbox"/> Male <input type="checkbox"/> Female
Date of Birth	/ /	/ /
Email Address		
Employment Status	<input type="checkbox"/> Employed <input type="checkbox"/> Retired <input type="checkbox"/> Business Owner <input type="checkbox"/> Homemaker	<input type="checkbox"/> Employed <input type="checkbox"/> Retired <input type="checkbox"/> Business Owner <input type="checkbox"/> Homemaker
Employment Income	\$	\$
Marital Status		State of Residence

Important Relationships

Any children, grandchildren or participant to include in this plan.

Participant Name	Date of Birth	Relationship
	/ /	
	/ /	
	/ /	
	/ /	
	/ /	
	/ /	

College Goal

Importance High Low 10 ↔ 1	Who is attending college?	Start Year	# of Years	Target Amount		Notes
				Enter Own Estimate or Type	Use the Amount for a Specific College	• prepaid years • scholarship • loans
8	e.g., Susan	2022	4		State University	\$1,000/yr scholarship

## Investment Assets

Identify the resources you have to fund your college goals.

Participant Name	529 Plan	Coverdell Account	Other

## Outside Assets

Assets owned by other (account owned by child or relative) in attendees name.

Participant Name	Description	Value	Additions

## Risk Score

How much market risk are you willing to accept? On a scale of 1 to 100, with 1 being the lowest risk and 100 being the highest risk, what's your risk score?

Client	Co-Client



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