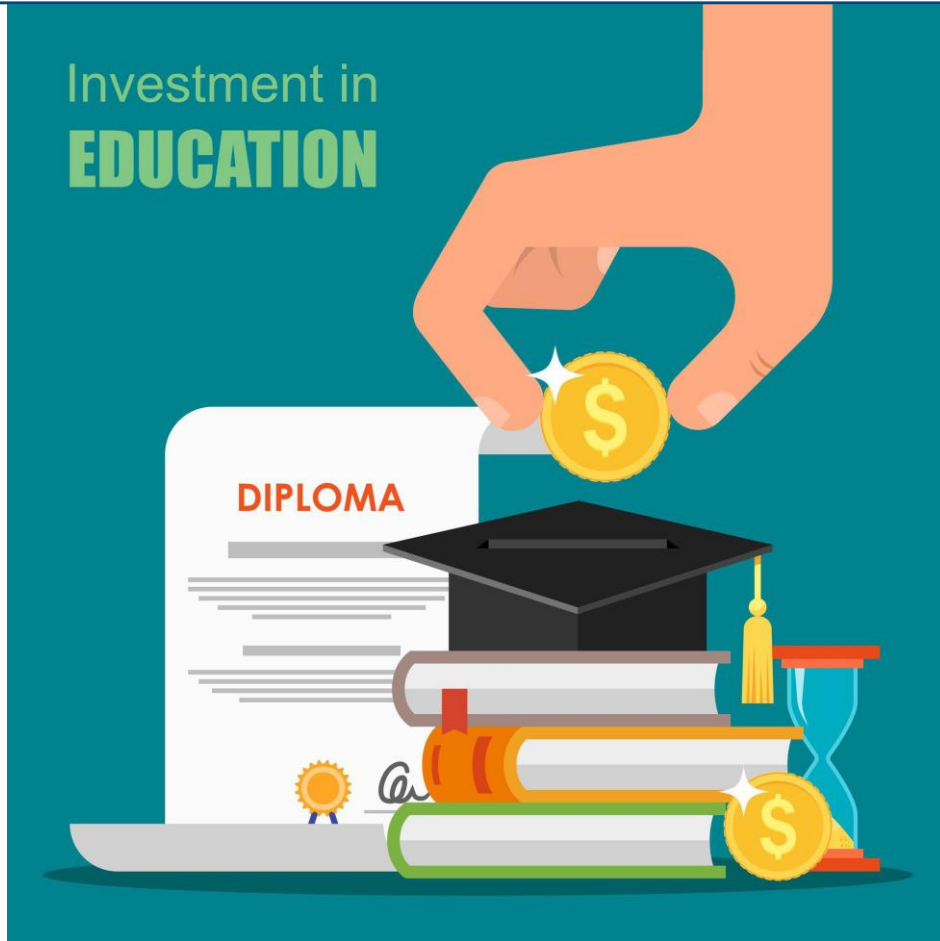


Investment in EDUCATION



Confidential Family Questionnaire

Family: _____

Address: _____

Phone: _____ Email: _____

This questionnaire will allow us to provide a college solutions report for your family based on your unique circumstances and requirements. All the information you provide is confidential and will not be shared with anyone outside of our group. Please take the time to be as complete and accurate as possible. Our solutions and recommendations will only be valid if the information you supply is accurate and complete.

Securities and investment advisory services offered through Registered Representatives and Investment Adviser Representatives of Equity Services, Inc., 354 Mountain View Drive, Suite 200, Colchester, VT 05446 (802) 864-6819. Equity Services, Inc. is independent of Strategies For College, Inc.



Student Information (Use Additional Page if Necessary)	Primary Student	Trailing Student 1	Trailing Student 2	Trailing Student 3
Students In Household				
Date of Birth				
High School Graduation Year				

Primary Student			
Colleges of Interest			
Student's Annual Income			
Estimated Cost In Today's \$			
Student will be <small>(circle those that apply)</small>	Full-time	On-Campus	Pursuing 4-Year Degree
Would Consider <small>(circle those that apply)</small>	Live at home	Comm College <small>(2 + 2)</small>	Work-Study <small>(campus job)</small>

Parent Information	Parent 1	Parent 2
Name		
Date of Birth		
State of Legal Residence		
Own Business > 100 FTE		
Veteran? G.I. Benefit \$\$	/	/

Eligibility For Special EFC Considerations <small>(check any of the following that apply)</small>	
Parent's Combined income < \$25,000	
Both Parents Eligible to file Form 1040A or 1040EZ	
Parent is a Dislocated Worker	
Qualified for/received Medicaid benefits	
Qualified for/received Supplemental Social Security Income benefits	
Qualified for/received Free or Reduced-Price School Lunch Program	
Qualified for/received Temporary Assistance for Needy Families (TANF)	
Qualified for/received Supplemental Nutritional Assistance Program (SNAP)	
Qualified for/receive WIC <small>(Special Supplemental Nutrition Program for Women, Infants, Children)</small>	

Parent's W-2 Data	Parent 1 W-2	Parent 1 W-2	Parent 2 W-2	Parent 2 W-2
Employer Name				
Amount in Box 1				
Amount in Box 12a – 12d, Only if Letter codes are: D, E, F, G, H, or S				
Amount/Letter Code	/	/	/	/
Amount/ Letter Code	/	/	/	/
Amount/Letter Code	/	/	/	/

Family Residence

Rent or Own? If renting, monthly payment	/
Primary Residence (Current Value/Purchase Price)	/
Mortgage Balance Owed/ Year of Purchase	/
Years Remaining/Interest Rate	/
HELOC: Maximum/Balance Owed	/
Interest Rate/Payment (P&I or Int Only)	/

If you own other real estate (personal, business, rental, land, etc.), please provide all the information above for each property on a separate sheet of paper

Self-Employed & Business Owners

Name of Business	
Legal Structure (C-Corp, S-Corp, Partnership, Proprietorship, LLC)	
Market Value of Business (on day FAFSA filed)	
Percent of Ownership	
# of Full Time Employees	
Does student applicant work for the business? (Y/N)	
What service or product does the business provide?	

Parent Tax Information (from IRS form 1040)

Tax Year (indicate if estimated)	No. in College	Filing Status (Box Checked: 1-6)
Total Number of Exemptions Claimed	Line 6d	
Tax-Exempt Interest	Line 8b	
Business/Self-Employment Income (Line 12 + Line 18 + Box 14 from Schedule K-1 or Form 1065)	See Note	
IRA Distributions (Line 15)	Taxable Portion (Line 15b)	
Pension/Annuity (Line 16a)	Taxable Portion (Line 16b)	
Social Security (Line 20a)	Taxable Portion (Line 20b)	
Total Income	Line 22	
Total Adjustments	Line 36	
Adjusted Gross Income (AGI)	Line 37	
Itemized Deductions (Schedule A if applicable)	Line 40	
Taxable Income	Line 43	
Tax	Line 44	
Refund/Amount Owed	75 or 78	

Untaxed Income/Exclusions

Foreign Income Tax Exclusion (Form 2555, Line 45)	
Special Fuels Credit (Form 4136, Line 17)	
EIC Credit (Form 1040, Line 41a)	
Additional Child Tax Credit (Form 1040, Line 67)	
Elementary/Secondary Tuition Payments	
Hope/Lifetime Learning Credit (Form 1040, Line 68)	
Child Support Paid	
Child Support Received	
Educational Loan Repayments	

Retirement/Savings/Assets - Parent 1

Plan Description	Type Qual/NQ	Balance	Annual Contribution	Employer Match	Institution

Retirement/Savings/Assets - Parent 2

Plan Description	Type Qual/NQ	Balance	Annual Contribution	Employer Match	Institution

College Savings	Balance Primary Student	Contribution Primary Student	Balance Other Students	Contribution Other Students
529 Plans				
UGMA				
Student Savings/Assets				
Other (Grandparent 529s, etc.)				

Paying for College

There are three ways to pay for college. Every family will choose some combination of these strategies.

- 1) **Save and Liquidate Savings**
- 2) **Pay-as-You-Go from Income**
- 3) **Borrow and Repay Later**

There are also two payors (after all institutional/government money has been applied):

Parent(s)

Student(s)

Indicate which payment method(s) do you anticipate employing; in what proportions; and who you anticipate be financially responsible each. Based these projections on your current thinking, with the understanding that these figures are neither a commitment, nor necessarily your ideal outcome.

(Sum of the percentages of each payment type must total 100%)

Portion of the Total Cost will come from Savings

%

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		

Portion of the Total Cost will come from Income

%

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		

Portion of the Total Cost will come from Borrowing

Who	Dollar Amount or % of Total	Source
Parent(s)		
Student(s)		