

Please fill in this sheet as accurately as possible. Estimate where necessary. Missing information will delay processing. All information is held in complete confidence. Please reference the workshop disclaimer.

Note to Separated, Divorced, Remarried, Adopted, Step or Grand Parents: Definition of Custodial Parents: Parent (s) that has custody of the student for the majority of the year. May not be the parent who takes the student as a dependent for tax purposes. If a parent divorces, remarries & has custody of the student for 1 day more than their ex, the new spouse is Custodial Parent #2. Their assets & income must be included.

**This form was designed for parents of ADI Students: Do not copy or distribute with out prior written approval. Please scale to Letter or Legal prior to printing.**

**QUESTIONS AND REFERRALS PLEASE EMAIL: HMDYMM@AOL.COM**

ADI Cedar Knolls	Workshop Date: / /	Initial & Date Approval: H.MCDONALD _____	ADI _____	CDNA _____
1 <sup>st</sup> Meeting	Location Home / ADI	Academic / Athletic / Career Assessment Date / /	Time ___:___ am/pm	Status _____
2 <sup>nd</sup> Meeting	Location Home / ADI	Academic / Athletic / Career Assessment Date / /	Time ___:___ am/pm	Status _____

## “GCP Generational College Planning: E.F.C. FACT SHEET”<sup>©</sup>

Today's Date (E.F.C. Fact Sheet Completed by Parents) ___/___/___		Part 1: Family Information		# OF STUDENTS IN COLLEGE THIS FALL: ____				
1.	Family Last Name: _____	Address: Street: _____		City: _____	St.: _____ Zip: _____			
2.	Contact Information: Telephone Daytime: (____) _____	Evening :(____) _____		Email _____				
3.	Custodial Parent 1 First Name: _____	D.O.B. ___/___/___	US Citizen? Yes / No	Relationship to Students Listed Below? _____				
4.	Custodial Parent 2 First Name: _____	D.O.B. ___/___/___	US Citizen? Yes / No	Relationship to Students Listed Below? _____				
5.	Parent Status: Married	Separated	Divorced	Single Parent Household	Widowed (If divorced or separated, list terms or conditions at end of this form.)			
6.	EMPLOYMENT STATUS: Parent #1 W2 1099 Self Unemployed Other	Parent #2: _____		Other Ex spouse / Biological Parent: _____				
7.	HOW ARE YOU PLANNING TO PAY FOR COLLEGE? (Check those which apply) <input type="checkbox"/> Parents Savings <input type="checkbox"/> Children's Savings <input type="checkbox"/> Current Income <input type="checkbox"/> Grants / Scholarships							
	<input type="checkbox"/> Federal College Loans <input type="checkbox"/> Loans: Other <input type="checkbox"/> Second Job <input type="checkbox"/> Retirement Accounts <input type="checkbox"/> Loans Against Retirement Accounts <input type="checkbox"/> Gifts / Loans from grandparents / Relatives <input type="checkbox"/> Trust Funds <input type="checkbox"/> Other							
8.	DO YOU OWN A FARM? Yes / No	If Yes, list value of Farm \$ _____ - Mortgages of _____ = _____.		Do you live on the farm? Yes / No				
9.	TOTAL NUMBER OF FAMILY MEMBERS (include students now in college, elderly parents in your home, adopted children, Etc.): _____			Handicapped parents or children?	Yes / No			
	Do you care for or are financially responsible for an elderly parent or relative? Or handicapped child or parent? If so explain: _____							
10.	Student's First Name	Last Name	Date of Birth	Month & Year College Starts	Name of College	Degree Program	Special interests or abilities?	\$Saved for College
	#1 _____	_____	_____	_____	_____	_____	_____	_____
	#2 _____	_____	_____	_____	_____	_____	_____	_____
	#3 _____	_____	_____	_____	_____	_____	_____	_____
	#4 _____	_____	_____	_____	_____	_____	_____	_____
	#5 _____	_____	_____	_____	_____	_____	_____	_____
11.	Are any students:	Graduate or professional student? Yes / No	Wards of the court? Yes / No	Both parents deceased? Yes / No	Any legal dependents (other than a spouse)? Yes / No			
12.	DO YOU HAVE LONG / SHORT TERM DISABILITY INSURANCE?		Parent #1 Yes / No	Parent #2 Yes / No	Students? Yes / No			

Part 2: Life Insurance Information (as of today)	Parent 1	Parent 2	Student # 1	Student # 2	Student # 3	Student # 4
Total Amount of Life Insurance Coverage:	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Cash Value of All Personal Policies (minus loans):	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total Coverage at Work	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Circle type of Ins. (W= whole life T= term O= other)	W / T / O	W / T / O	W / T / O	W / T / O	W / T / O	W / T / O

Part 3: Income & Tax Information (for last year)	Custodial Parents	Non Custodial Parent (If known)	Student # 1	Student # 2	Student # 3	Student # 4
Total number of dependants (line 00 of Form 1040)	# _____	# _____	# _____	# _____	# _____	# _____
Adjusted Gross Income (line 00 of Form 1040)	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Untaxed Social Security benefits	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Aid to Families with Dependent Children	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Child Support received	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Worker's Compensation	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Disability benefits	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Welfare benefits	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Cash support from non-custodial parent	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Interest on tax exempt bonds	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Housing, food & allowances for military, clergy, etc.	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Any other nontaxable income	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
TOTAL INCOME	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
If current income is expected to go up or down (other than normal raises) in the next 4 to 8 years: Use additional sheet and explain.						
List Payments (for last year):						
IRA, Keogh, 401(k) and 403(b) contributions	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
US Income Tax paid	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
State Income Tax paid	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Social Security Tax paid	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Child Support Paid By You	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
If Both Parents Work Indicate:	Last Years Income		This Year's Projected Income		Next Year's Projected Income	
Parent 1's income from work	\$ _____		\$ _____		\$ _____	
Parent 2's income from work	\$ _____		\$ _____		\$ _____	

Part 4: Asset Information (as of today)	Custodial Parents	Non Custodial Parent	Student # 1	Student # 2	Student # 3	Student # 4
Cash, including bank accounts, checking, savings, CDs, Money Markets, etc.	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Total value of retirement assets (pensions, annuities, IRAs, Keogh Plans, 401(k) plans, etc.)	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Stocks, bonds, and other securities	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Mutual Funds	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Trust funds (value as of today of principal amount)	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Commodities and precious metals	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Value of any assets or investments not listed above:	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____	\$ _____
Parents Primary Home: (Fair Market Value \$ _____ minus First mortgage \$ _____ Minus Second Mortgage \$ _____ = Equity _____)						
Parents Other Real Estate: (Fair Market Value \$ _____ minus First mortgage \$ _____ Minus Second Mortgage \$ _____ = Equity _____)						
Students Other Real Estate: (Fair Market Value \$ _____ minus First mortgage \$ _____ Minus Second Mortgage \$ _____ = Equity _____)						
Business or commercial farm (Fair Market Value \$ _____ minus debt \$ _____ = Equity _____)						

Use Additional Sheet If Needed.

**Part 5: Student Information    One page per student**

First Name \_\_\_\_\_ Last Name \_\_\_\_\_ School Name \_\_\_\_\_ Age: \_\_\_\_\_ Grade: \_\_\_\_\_

Freshman Curriculum \_\_\_\_\_

Sophomore Curriculum \_\_\_\_\_

Junior Curriculum \_\_\_\_\_

Senior Curriculum \_\_\_\_\_

Academic Achievements \_\_\_\_\_

Athletic Achievements \_\_\_\_\_

Language Achievements \_\_\_\_\_

Music Achievements \_\_\_\_\_

Type of Learner: \_\_\_\_\_

3 Favorite Teachers \_\_\_\_\_

3 Favorite Classes \_\_\_\_\_

3 Favorite Movies \_\_\_\_\_

3 Favorite Books \_\_\_\_\_

3 Favorite Songs \_\_\_\_\_

Other Important Data \_\_\_\_\_

\_\_\_\_\_

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