



Education Funding Questionnaire

Client Name(s) _____ Date: _____

1. Do you expect to pay higher education cost for any relatives? Yes No
 Children Grandchildren Other
2. Do you have any college funding accounts currently established? Yes No

	<u>Account 1</u>	<u>Account 2</u>	<u>Account 3</u>	<u>Account 4</u>
Student(s)				
Type of Account ¹				
Current Balance				
Deposit Frequency				
Deposit Amount				
Custodian				

¹ Education IRA, Savings Account, Section 529, Prepaid Tuition, UTMA/UGMA, Brokerage

3. Is any else planning to contribute to funding education for these students? Yes No

If yes, how much? \$ _____

4. List below those you plan to pay higher education cost for.

	<u>Student 1</u>	<u>Student 2</u>	<u>Student 3</u>	<u>Student 4</u>
Name				
Current Age				
No Years until Starting				
No years in school				
Private, Public, CC				
Cost-tuition, books, etc.				
Cost-Room Board				
Inflation rate of costs				
Percent you will pay				