College Zoomer®

ENVESTNET MoneyGuide

Personal Information

	Client (C)		Co-Client (Co)	
Name				
Gender	☐ Male ☐ Female		☐ Male ☐ Female	
Date of Birth	/ /		/ /	
Email Address				
Employment Status	☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker		☐ Employed ☐ Retired ☐ Business Owner ☐ Homemaker	
Employment Income	$		$	
Other Income (non-investment only)	$		$	
Marital Status		State of Residence		

Important relationships

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

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

College Goal

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
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? If you're not sure, go ahead and guess. You can always talk with your advisor and revise if needed.

Client	Co-Client

Often college savings funds are invested differently from a retirement portfolio. For this reason, it is here that we ask for a risk score that applies only to the handling of your college savings funds.

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