

# College Bound Student Info. Worksheet



We ask that you fill out the applicable information here and bring it to your appointment (please do not email this form as it would be insecure during transit).

Student Name: \_\_\_\_\_

Student's High School: \_\_\_\_\_

Student's College: \_\_\_\_\_

Student's H.S. Graduation Date (mm/yy): \_\_\_\_\_

Student's Contact Information: Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred Contact Method: \_\_\_\_\_

Student's CAP COM Account Number: \_\_\_\_\_

Parent(s) Names: \_\_\_\_\_

Parent's Contact Information: Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Preferred Contact Method: \_\_\_\_\_

Parent CAP COM Account Number: \_\_\_\_\_

## I am interested in learning more about (check all that apply):

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Young Adult Checking | <input type="checkbox"/> Mobile Banking                | <input type="checkbox"/> FAFSA Form Prep |
| <input type="checkbox"/> Student Loans        | <input type="checkbox"/> Mortgages                     | <input type="checkbox"/> Scholarships    |
| <input type="checkbox"/> School Banking       | <input type="checkbox"/> Home Equity Loans             | <input type="checkbox"/> Great Grades    |
| <input type="checkbox"/> Remote Check Deposit | <input type="checkbox"/> Reading Programs              | <input type="checkbox"/> Auto Loans      |
| <input type="checkbox"/> Car Buyers Helpline  | <input type="checkbox"/> College Admissions Consulting | <input type="checkbox"/> Online Banking  |
| <input type="checkbox"/> College Workshops    | <input type="checkbox"/> Financial Planning            |  |

Student's GPA: \_\_\_\_\_

Have you taken the SAT?     Yes     No

If yes, what were your scores?

Reading: \_\_\_\_\_

Math: \_\_\_\_\_

Writing: \_\_\_\_\_

Have you taken the ACT?     Yes     No

If yes, what was your score? \_\_\_\_\_

Please list colleges or universities you have visited so far:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

Please list colleges or universities you plan on visiting:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

What are you interested in studying in college?

(List any major(s) or areas of concentration): \_\_\_\_\_  
\_\_\_\_\_

Sports or Arts Participation: \_\_\_\_\_  
\_\_\_\_\_

Club/Group Participation: \_\_\_\_\_  
\_\_\_\_\_

Honors Achieved: \_\_\_\_\_  
\_\_\_\_\_

Completion of this page is voluntary however this information will provide us with the background data necessary to prepare a thorough plan and give us a better idea of your possible financial aid packages. If you are under the age of 18, by submitting this completed form you agree that you have obtained the permission of your parent/guardian.

Parent's Employment

Employed    Self-Employed    Retired    Homemaker    Unemployed

Employer/Type of Business	Position & Income	Years Employed/Anticipated Retirement
Address:		
Phone:		
Spouse Employer	Position & Income	Years Employed/Anticipated Retirement
Address:		
Phone:		

If retired, source of income

Type	Amount	Spouse Amount
Social Security		
Investments/Dividends		
Other		

Transaction Accounts (Checking)

Financial Institution	Type of Accounts/Balance

Savings

Savings Account	Money Market	CD
Spouse Savings Account	Money Market	CD

Investments

Stocks/Bonds	Where Held:
Mutual Funds	Where Held:
IRAs	Where Held:
401(k)/Retirement Accounts	Where Held:
College Funds (529 Plan)	Where Held:
Other	Where Held:

Life Insurance

<b>Life Insurance</b>	Term	Amount	Whole Life	Amount
- Parent(s)				
- Student				
Other				

Debits

Type of Loan & Company	Balance	Payment	Rate	Term
Mortgage				
Home Equity				
Auto				
Personal Loan				
Credit Card				
Other				

Assets

Type	Approximate Value
Real Estate	
Business	
Possible Inheritance	
Other	



Federally insured by NCUA

