



# College Bound

## Student Info Worksheet

Please fill out the applicable information here and bring it to your appointment with a Broadview Certified College Funding Specialist. Do not send personal account information via email.

Student's Name: \_\_\_\_\_

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

Student's High School Graduation Date (mm/yyyy): \_\_\_\_\_

Student's College (current or accepted): \_\_\_\_\_

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

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

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

Student's Broadview Account Number: \_\_\_\_\_

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

Parent Contact Information: Phone: \_\_\_\_\_

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

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

Parent Broadview Account Number: \_\_\_\_\_

Other Children/Dependents & Ages: \_\_\_\_\_

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

Please list colleges or universities you have visited so far:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

Please list colleges or universities you plan on visiting:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

What are you interested in studying in college?

List any major(s) or areas of concentration:

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Sports or Arts Participation:

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Club/Group Participation:

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Honors Achieved:

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**Completion of this section 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. We might also recommend deeper financial discussions with Regional Licensed Branch Representatives, Broadview Wealth Management, and a Licensed Mortgage Loan Officer. 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 Employment

☐Employed   ☐Self-Employed   ☐Retired   ☐Unemployed

Primary Financial Institution:

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Investments

☐Yes   ☐No

529 Plan

☐Yes   ☐No

Mortgage and Home Equity

☐Yes   ☐No

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