To provide you with the most comprehensive detailed College/Financial Plan, we need you to fill out this PDF and get it back to us as soon as possible. This will enable us to develop and design a customized plan tailored to your needs, your concerns, and your goals.

What you will need to fill out this Questionnaire is the following:

1) Most recent Tax Returns
2) Most recent investment statements
3) Mortgage Balance/Rate
4) 4 Potential Colleges for your student (for College Clients only)

Please complete this PDF as detailed as possible and if you have any questions, or concerns, do not hesitate to reach out to us. We would be happy to assist you as much as you'd like."

Once completed save the pdf and email it to 'eli@parrosmail.com' along with your financial statements and we will get your plan started. Once you have sent us the information please feel free to visit our website: www.parrosfinancialgroup.com to schedule your Financial Plan Review Appointment.

We are excited to assist you and also look forward to working with you!

DETAILED FINANCIAL PLANNING QUESTIONNAIRE

Parent's Address

Husband's Information

Last Name:

First Name:

Date of Birth:

E-mail:

Work Phone:

Cell:

Place of Employment:

Position:

Wife's Information

Last Name:

First Name:

Date of Birth:

E-mail:

Work Phone:

Cell:

Place of Employment:

Position:

Family Information

Child 1: Last Name:

First Name:

Date of Birth:

High School Graduation Year:

Students Income:

Students Checking Account Balance

Email:

Phone Number:

Name of Students High School

4 colleges student wants to go to

Child 2: Last Name:

Date of Birth:

High School Graduation Year:

Students Income:

Students Checking Account Balance

Email:

Phone Number:

Name of Students High School

4 colleges student wants to go to

Child 3: Last Name:

Date of Birth:

High School Graduation Year:

Students Income:

Students Checking Account Balance

Email:

Phone Number:

Name of Students High School

4 colleges student wants to go to

Income Details

Husband's Income [ ] Wife's Income [ ]

Combined adjusted gross income [ ]

Which tax form do you file: ● 1040 ☐ 1040E ☐ 1040A

How do you file: ● Joint ☐ Head of Household

Amount of Federal Tax Paid: [ ] Do you own own business: [ ]

If yes, fewer than 100 employees? [ ]

Do you have untaxed income? [ ]

How much will you receive from social security and at what age: [Husband / Wife] [ ]

At what age would you both like to retire? Husband: [ ] or [ ] Wife: [ ] or [ ]

How much net income, in today's dollars, per year would you like to have in retirement?

Annually: $

How much are you contributing to your child's college per year:

Child 1: $ Child 2: $ Child 3: $

How much per year are you planning on paying in tuition fees for your Child (or children)?

Annually per child: $ Amount of years per child: [ ]

How much income will you receive from your pension per year? At what age does it begin?

Husband: $ Age: [ ] Wife: $ Age: [ ]

Do you have any goals between now and retirement? (Wedding, Vacation Home, New Kitchen, New Car,etc)

Goal	Start Year	Total Cost

Retirement Assets i.e.IRAs, 401k, 403b, etc.

As of Today	Husband's	Annual Contribution	Total Value Of
IRAs			
Roth IRAs			
Company Sponsored Plans			
*Your Contributions			
*Company Contributions			
Previous Employer Retirement Plans			
Additional Retirement Plans			
Investment Property Income			
Total:			

As of Today	Wife's	Annual Contribution	Total Value Of
IRAs			
Roth IRAs			
Company Sponsored Plans			
*Your Contributions			
*Company Contributions			
Previous Employer Retirement Plans			
Additional Retirement Plans			
Investment Property Income			
Total:			

Non-Retirement Assets
As of TODAY, Total Value of:

	Husband	Wife	Joint
Checking/Saving Accounts	$	$	$
CD's	$	$	$
T-Bills	$	$	$
Money Market Funds	$	$	$
Mutual Funds	$	$	$
Stocks/Stock Options	$	$	$
Bonds	$	$	$
Trust Funds	$	$	$
Other Securities:	$	$	$
Educational IRAs	$	$	$
College Savings Plans for Students: including MESP and 529's. No included METS	$	$	$
Non-Retirement Annuities	$	$	$
Other Investments	$	$	$
Total Investments	$	$	$

Life Insurance Information:
Term, Whole, Universal, Annual Premium, etc.

	Husband	Wife	Notes
Group/Term Life	☐ YES ☐ NO	☐ YES ☐ NO	
Death Benefit	$	$	
Cash Life Insurance	☐ YES ☐ NO	☐ YES ☐ NO	
Death Benefit	$	$	
Cash Value	$	$	
Annual Premium Payment	$	$	
Disability Insurance	☐ YES ☐ NO	☐ YES ☐ NO	

Real Estate Details

What is your home worth: ______

What is Owed: ______

Mortgage Term (how many years left): ______

Year Purchased: ______

Cost of home when purchased: ______

Mortgage Origination Date: ______

Mortgage Interest Rate: ______ %

Investment/Properties/Land/Vacation Homes/Rental Homes

	Property 1	Property 2	Property 3
Value:	$	$	$
Debt:	$	$	$
Year Purchased:	$	$	$
Purchase Price:	$	$	$

Name of current Financial Advisor: ______

Name of current CPA: ______

City and State of Financial Advisor: ______

City and State of CPA: ______