- Information you provide is confidential and subject to our Privacy Notice.
- Use an estimated date of birth for an unborn/planned child.
- **There is no charge for your FREE Financial Plan for College from Physician Family Financial Advisors.** It's just our way of giving you a sample of how we work, and we hope you'll like it. We offer more comprehensive financial planning and investment advisory services to our clients for a fee. Please contact us to learn more.

Student's name		Student's DOB	
Parent's name		Today's Date	

How did you hear about this free service? ☐ I received a post card. ☐ I visited your website.

What kind of education are you planning for your student?

☐ 4-year private schools
☐ 4-year public out-of-state schools
☐ 4-year public in-state schools
☐ 2-year private schools
☐ 2-year public out-of-state schools
☐ 2-year public in-state schools
☐ They will attend the following university: ____________________________ in __________ (state)

What does your child want to be when they grow up?

____

____

How are you preparing to pay for college right now?

- Tell us how much you have already saved and how much you are saving each year.
- Be certain to include less-than-obvious assets (real estate, businesses, etc.) if you plan to sell them to pay for college.

	Current total amount	Regular contribution amounts
529 savings account		☐ Monthly ☐ Annually
Pre-paid tuition plan		☐ Monthly ☐ Annually
Coverdell Education Savings account		☐ Monthly ☐ Annually
UTMA/UGMA or "custodial" account		☐ Monthly ☐ Annually
Regular after-tax mutual fund, bank or brokerage account		☐ Monthly ☐ Annually
Other: ______________________________		☐ Monthly ☐ Annually
Other: ______________________________		☐ Monthly ☐ Annually

If someone other than you is planning to help pay for college, give **specific** details below.

☐ not expecting outside help

____

____

How do you plan to invest your college savings?

☐ **Aggressive**: almost all high risk securities, like stocks or stock funds
☐ **Moderate-aggressive**: mostly high risk securities like stock funds, with some low risk securities like bond funds
☐ **Moderate**: about half high risk securities stock funds and low risk securities like bond funds
☐ **Moderate-conservative**: mostly low risk securities like stock funds, with some high risk securities like bond funds
☐ **Conservative**: almost all low risk securities, like bond funds or bank deposits

Help us deliver your FREE Financial Plan for College

Email address	
Phone number & best days to call	
Mailing address	

Help us get to know you!

How many physicians are in your household/family? ______________________________________

What is your area of specialization? ____

What other parts of your financial life might need attention?

☐ College planning for my other child/children
☐ Preparing for disability and reviewing my disability insurance coverage
☐ Preparing for premature death and reviewing my life insurance coverage
☐ Planning for retirement
☐ Estate planning (wills, trusts, etc.)
☐ Preparing for a financial emergency
☐ Protecting my assets from lawsuits/creditors
☐ Preparing to support aging parents or other loved ones
☐ Making fundamentally sound investments

Next Steps

1. Return your completed organizer to us.
   By mail: Physician Family Financial Advisors; 399 E. 10th Ave Suite 103; Eugene OR 97401
   By fax: 888-465-0899
2. We will prepare your Free Financial Plan for College and contact you to schedule delivery by phone/email or in-person.

About Physician Family Financial Advisors

For more than 15 years, we've been helping families like yours achieve financial security that can last a lifetime. As a fee-only financial planning and investment advisory firm, we don't sell products or accept commissions so you'll know we have your best interests in mind as we serve you.

Ben Utley , our Certified Financial Planner™ has been recognized by major national publications for his work with physicians, and is listed among *Medical Economics* "Best Financial Advisors for Doctors".

Call us at 541-463-0899 (888-465-0899 nationwide).