



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:

Sports or Arts Participation:

Club/Group Participation:

Honors Achieved:

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 Homeowners Advantage. 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:

Investments

Yes No

529 Plan

Yes No

Mortgage and Home Equity

Yes No