

**PG On-Call® Client Intake Form: Medical Residents and Fellows**

Today's Date

**INSTRUCTIONS: PLEASE READ CAREFULLY**

1. Complete the information requested below, save a copy, and send to [paul@PGPresents.com](mailto:paul@PGPresents.com).
2. Go to [www.NSLDS.ed.gov](http://www.NSLDS.ed.gov) under Financial Aid Review and send us a copy of your financial aid summary which lists all your loans in columns.  
DO NOT SEND THE DOWNLOADABLE TEXT FILE.
3. Under Student Loans below, use the drop down menu and list only loans that are not on NSLDS, such as private loans and loans directly from your institution.
4. We will contact you about a consultation once both your Client Intake Form (CIF) and NSLDS record are received.

Full Name _____	Medical School _____	Graduation Date <input type="text"/>
Phone Number _____	Residency Program _____ <i>For example, Pediatrics at State University Hospital</i>	Completion Date <input type="text"/>
Email Address _____	Current Status _____ <i>For example, M4, PGY-1, PGY-2, etc.</i>	Fellowship <input type="text"/>
Marital Status _____ Family Size _____	Did not file a prior year return <input type="checkbox"/>	Estimated current Annual Gross Income _____
Prior year Adjusted Gross Income (AGI) _____	If married, do you file jointly? <input type="checkbox"/>	
Current state where you reside _____	Who is your loan servicer for your federal loans? _____	
Are you in repayment on federal loans? <input type="checkbox"/>	If yes, what kind of plan? _____	If an income plan, date of recertification? _____

Student Loans*	Academic Year	Current Balance	% Rate	Status	Current Loan Servicer
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Total**

What is the total amount of your monthly payment on these loans, if you are in repayment status? \_\_\_\_\_

*\*Do not include any loans listed on NSLDS (see Step 3 above).*