

PG On-Call® Client Intake Form: Medical Residents, Fellows and Attending Physicians

Today's Date

INSTRUCTIONS: PLEASE READ CAREFULLY

1. Complete the information requested below, save a copy, and send to paul@PGPresents.com.
2. Go to 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

Phone Number Residency Program Completion Date
For example, Pediatrics at State University Hospital

Email Address Current Status Fellowship
For example, M4, PGY-1, PGY-2, etc.

Marital Status Family Size If married, do you file jointly? Yes No Did not file a prior year return Current state where you reside

Prior year Adjusted Gross Income (AGI) Estimated current Annual Gross Income

Current loan servicer for your federal loans? Current monthly payment on your federal loans?

Are you in repayment on federal loans? Yes No 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	<input type="text"/>		

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

What is the total monthly payment on your NON federal loans listed above, if you are in repayment status?

Email to Paul

Print Form