

PG On-Call® Client Intake Form: Non-Medical School Graduate

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 _____	School _____	Graduation Date <input style="width: 100%;" type="text"/>
Phone Number _____	Current Status _____ <i>For example, currently employed, unemployed, working part-time, etc.</i>	
Email Address _____		
Marital Status _____ Family Size _____	Current state where your reside _____	If married, do you file jointly? <input type="checkbox"/>
Prior year Adjusted Gross Income (AGI) _____	Did not file a prior year return <input type="checkbox"/>	Estimated current Annual Gross Income _____
	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 style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	_____
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	_____
<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	_____
Total		<input style="width: 100%;" type="text"/>			

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).*