

**CLARK FINANCIAL ADVISORS**

4128 Crosshaven Drive • Birmingham, AL 35243

**Educational Projections – Information Worksheet**

Client's Name: \_\_\_\_\_

Child/Grandchild # 1:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Please check one of the following types of colleges desired to plan for:

State College: \_\_\_\_\_

“Middle of the road” College: \_\_\_\_\_

Privates College: \_\_\_\_\_

PACT Contract: Yes \_\_\_\_\_ No \_\_\_\_\_

Estimated money set aside for education: \$ \_\_\_\_\_

Child/Grandchild # 2:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Please check one of the following types of colleges desired to plan for:

State College: \_\_\_\_\_

“Middle of the road” College: \_\_\_\_\_

Privates College: \_\_\_\_\_

PACT Contract: Yes \_\_\_\_\_ No \_\_\_\_\_

Estimated money set aside for education: \$ \_\_\_\_\_

Child/Grandchild # 3:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Please check one of the following types of colleges desired to plan for:

State College: \_\_\_\_\_

“Middle of the road” College: \_\_\_\_\_

Privates College: \_\_\_\_\_

PACT Contract: Yes \_\_\_\_\_ No \_\_\_\_\_

Estimated money set aside for education: \$ \_\_\_\_\_

Child/Grandchild # 4:

Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Please check one of the following types of colleges desired to plan for:

State College: \_\_\_\_\_

“Middle of the road” College: \_\_\_\_\_

Privates College: \_\_\_\_\_

PACT Contract: Yes \_\_\_\_\_ No \_\_\_\_\_

Estimated money set aside for education: \$ \_\_\_\_\_