

Clear Form

**One-Time Consultation 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](mailto:paul@PGPresents.com).
2. Go to [StudentAid.gov](http://StudentAid.gov) and access your “dashboard” listing all your federal loans. Send us the entire listing, including loan details, preferably as a PDF.
3. Under Student Loans below, use the drop down menu and list only loans that are NOT at [StudentAid.gov](http://StudentAid.gov), such as private loans and loans directly from your school.
4. We will contact you to schedule your consultation once the Client Intake Form and federal student loan summary from [StudentAid.gov](http://StudentAid.gov) are received.

Full Name  Medical School  Graduation Date

Phone Number  Residency Program   
*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"/>
		<b>Total</b>	<input type="text"/>		

*\*Do not include any loans listed at [StudentAid.gov](http://StudentAid.gov) (see Step 3 above).*

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

**Questions? Email**

**Print Form**