

Clear Form

One-Time Consultation Client Intake Form: Non-Medical School Graduates 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 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, 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 are received.

Full Name School Graduation Date
 Phone Number Current Status Current Degree
 Email Address *For example, currently employed, working part-time, 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 at 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