



New Client Questionnaire - Lockwood College Consulting

Hi there! Please answer as accurately as humanly possible and return so that we can get a jump on preparing your financial aid forms!

1. Parents' names _____

2. Address _____

3. Phone number(s) Home _____ / Cell _____

Primary e-mail address of each parent _____

Please provide answers to the following questions pertaining to the year the student will enter college.

4. How many children will be in college at least half time while student is in college? _____

5. How many of student's parents will be in college at least half time? _____

6. Complete the following regarding **student and siblings** pertaining to current academic year

Name	Date of Birth	Grade	School	Tuition (If Any)

Colleges under consideration: *If student is a HS Senior, please indicate next to each school listed whether the student is applying **ED** (Early Decision), **EA** (Early Action) or **R** (Regular). **If unknown, you can update fall of Senior year of HS**



Final Requests

Please submit the following important documents/information by regular mail, email or fax, whichever you prefer (pearl@andylockwood.com, 516.908.4418, mailing address below):

- First three pages most recent **Federal and State Tax Returns** (Parent and Student if applicable, corporate if self-employed). If mailing, send copies, not originals!
- **Please verify College Board User Name & PW**, for student, and **e-mail address**
- Last note: **It is your (the client's) responsibility to apprise us of all priority financial aid deadlines, whether your child is applying Early Action or Early Decision, and all other information relevant to timing! We do our best to stay on top of this information, but the responsibility lies with you, the client!**

Once we have your info, Pearl will contact you about the rest of the process!

We appreciate the opportunity to serve you!

For the firm,

A handwritten signature in blue ink that reads "Andy Lockwood".

Andrew Lockwood
Lockwood College Consulting
240 Glen Head Road # 274
Glen Head, New York 11545
516.882.5464 (Telephone)
516.908.4418 (Facsimile)
andy@andylockwood.com