# miller student loan consulting

STUDENT LOAN QUESTIONNAIRE

**2021**

# client data

 Please fill in the box below.

|  |  |
| --- | --- |
| Full Name |  |
| Email |  |
| Current Phone |  |
| Current Address |  |
| Time Zone |  |
| DOB |  |
| SSN |  |
| Membership Type |  |

1. Do you have any urgent student loan concerns, e.g. delinquency, a hefty upcoming payment, moving out of the country, etc.? Please describe it below.

Enter your answer to #1 here.

1. Please write a thorough, detailed description of your student loan situation. What would the best case scenario of your repayment look like?

Enter your answer to #2 here.

# FSA info

1. Please write your FSA username, password and challenge questions, below.

(If you don’t have this yet, you can create it by clicking [here](https://studentloans.gov/myDirectLoan/login.action))

|  |  |  |  |
| --- | --- | --- | --- |
| FSA ID |  | FSA Password |  |

1. Challenge question + answer:
2. Challenge question + answer:
3. Challenge question + answer:
4. Challenge question + answer:

# spouse info

If you are married, please answer questions 4 – 6. If not, skip to Student Loan Info section.

1. Due to Obama’s most recent regulation changes (REPAYE, December 2015), your spouse needs to create an FSA ID at [WWW.FSAID.ED.GOV](http://WWW.FSAID.ED.GOV) even if s/he does not have student loans. Please write their FSA ID and password, below.

|  |  |  |  |
| --- | --- | --- | --- |
| FSA ID |  | FSA Password |  |

1. What is your spouse’s current income?

Enter your answer to #5 here.

1. Does your spouse have any federal student loan debt? If so, how much?

Enter your answer to #6 here.

# student loan info

Please list your usernames and passwords for all your student loan accounts, below.

|  |  |  |
| --- | --- | --- |
| Student Loan Servicer | **User ID** | Password |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

Don’t have online accounts
for your student loans yet?

Creating them is easy.

Simply [Google](http://www.google.com) *Register online* (name of servicer, e.g. Wells Fargo) and follow the prompts from your student loan servicer.

If you have **Great Lakes** loans,
please write your pin # here:

**Pin #:**

If you have **Fedloan** loans, please
list your 3 security questions here:

* 1.
	2. 
	3.
	4.



SCHOOL INFO

1. What school(s) did you attend while receiving student loans?

Enter your answer to #7 here.

1. What year did you establish your oldest student loan that still has a balance?

Enter your answer to #8 here.

1. If you are still in school, when will you finish? If you are out of school, do you plan on going back?

Enter your answer to #9 here.

1. What year did you graduate, or, what year did you enter repayment?

Enter your answer to #10 here.

EMPLOYMENT INFO

1. Are you working less than 30 hours per week right now? What is your current job situation?

Enter your answer to #11 here.

1. Do you work for, or planning to work for, a non-profit company or government agency?

Enter your answer to #12 here.

1. If you *are* working for a non-profit: How many months have you already been working for
a non-profit or government agency?

Enter your answer to #13 here.

# TAxes & personal finance

Single,
Married Jointly, Married Separately, Widow(er),
Head of Household.

Adjusted Gross Income

|  |  |  |  |
| --- | --- | --- | --- |
| AGI | Income | Family Size | Filing Status |
|  |  |  |  |
|  |  |  |  |

# credit score

1. What is your approximate credit score? (Only necessary if you have private loans. You can get your credit score, free, [at this link](http://www.creditkarma.com/).)

Enter your answer to #14 here.

1. How much are you prepared to pay monthly for your entire student loan payments right now? In 1 year? In 5 years?

Enter your answer to #15 here.

# final details

1. Is there anything else you’d like me to know, that we haven’t covered in this Questionnaire?

Enter your answer to #16 here.

1. How did you find me? If you were referred by a person or organization, please let me know so I can thank them.

Enter your answer to #17 here.

 Thank you for your efforts!