

01 / RECORD THE FACTS

Compare repayment plans

Put loan balances, plan eligibility, payments and PSLF assumptions in one comparison.

Prepared on

Review on

Record the source and date for every estimate or term. Mark missing facts as unknown.

1 Loan types, balances and rates

2 Income and household assumptions

3 Plans to compare and eligibility

For preparation only. This worksheet does not provide financial, legal, tax or insurance advice.
Verify current rules and written terms; use a qualified professional for advice about your situation.

02 / CHECK THE OPEN QUESTIONS

Compare repayment plans

Put loan balances, plan eligibility, payments and PSLF assumptions in one comparison.

Keep questions beside the relevant terms. Bring your original documents to review.

Record the source and date for every estimate or term. Mark missing facts as unknown.

4 PSLF employment and payment records

5 Payment estimates and dated rules

6 Questions, next step and review date

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