



Information Needed For Your Appointment:

Please bring the documentation/information requested below with you for your appointment. If you have questions, please be sure to contact our office. We are here to help!

331 Centennial Avenue, Suite 102, Cranford, New Jersey 07016
 Phone 908-276-9140 Fax 908-276-9114

	Mother	Father	Student
1. Completed Garretson Financial Client Information Form	Available at www.GarretsonFinancial.com If you prefer, call 908-276-9140 and one will be mailed to you		
2. Parent <i>and</i> Student FAFSA PIN Numbers. Please enter on Client Info Form. These numbers must be requested on line at www.pin.ed.gov .	PIN for __Mother OR __Father (✓) <i>one</i>		
3. www.Collegeboard.com Student Username and Password. Please enter on Client Info Form			(✓)
4. Federal and State tax returns (parent's and student's most recently completed).	(✓)	(✓)	(✓)
5. Current year earnings. * (Bring most recent pay stubs or W-2.)	(✓)	(✓)	(✓)
6. Child support payments made or received, if applicable. *			
7. Net business or rental income (income minus expenses). *			
8. Interest and dividends received by parents AND student. *			
9. The purchase price of your home, year purchased, mortgage balance, home equity loan balance, and monthly mortgage payment (new clients only). (CSS Profile Only)	Purchase Price _____ Year of Purchase _____ Mortgage Bal _____ Mortg Pmt _____ Home Eq Bal _____ Home Eq Pmt _____		
10. Current value of parent's AND student savings (checking accounts, savings accounts, CDs, etc.).			
11. Current value of parent's AND student investments (stocks, bonds, mutual funds, 529 plans etc.).			
12. Current value of parent's AND student retirement accounts (CSS Profile Only)			
13. Tuition paid, detailed by student, incl. elementary and secondary school tuition. (CSS Profile Only)	Please detail on additional sheet as necessary		
14. Social Security benefits received.			
15. Value of other real estate owned, mortgage balance, year purchased, and original purchase price.	Purchase Price _____ Year of Purchase _____ Mortgage Bal _____ Home Eq Bal _____ Please detail on additional sheet as necessary		
16. Value of parents' business (if over 100 employees) or farm; debt on business or farm. * (CSS Profile Only)			
17. Current contributions to IRA, TSA, 401K and Keogh plans. *			
18. Family's medical and dental expenses not paid by insurance. (Include insurance premiums.) (CSS Profile Only)			

* Estimate these figures if necessary.