



College Financial Aid Planning FAQ's

When should you make an appointment with Garretson Financial, Inc.?

The most advantageous time to have your financial aid profile reviewed is prior to January 1st of the student's *junior* year in high school. If aid eligibility or assets are not an issue, the parents should make an appointment as early in their child's senior year as possible.

How do I make an appointment?

Simply call Garretson Financial, Inc. at 908-276-9140 to arrange a mutually convenient time. Our office is open during normal business hours, Monday through Friday as well as evenings by appointment.

What information will I have to bring to the appointment?

Upon making an appointment, a checklist of required information will be sent to you. Your previous year's tax return, savings and mortgage balances, and an estimation of this year's earnings are some of the items that will be necessary. A full list of information needed is located on our website: www.GarretsonFinancial.com

How do I get to Garretson Financial, Inc.?

We are conveniently located on South 21st Street in Kenilworth, just off Kenilworth Boulevard and convenient to the Garden State Parkway. Directions are available on our website.

How long will the appointment last?

On average, a comprehensive consultation will last between 60 and 90 minutes.

How much does this cost?

For the current academic year, the first year fee is \$400.00, which includes the preparation of the Federal and State financial aid forms, if necessary. For returning clients, the fee is \$125.00. (Financial aid forms must be completed each year.) For additional family members in college, there is a \$50.00 per student charge for FAFSA completion. Charges for additional forms, if required, are detailed on our schedule of fees. Our College Financial Aid services are provided free of charge for clients who have investment accounts under management with Garretson Financial.

SHORT FORM INITIAL PRIVACY NOTICE

Garretson Financial, Inc., an independent financial planning firm, is committed to safeguarding the confidential information of its clients. We hold all personal information provided to our firm in the strictest confidence. These records include all personal information that we collect from you or receive from other firms in connection with any of the financial services provided by Garretson Financial, Inc. We also require other firms with whom we deal to restrict the use of your information.

A complete privacy statement concerning our firm's policy is available upon request. You may obtain it in person, or through a written or electronically delivered request to John G. Garretson, CFP®, at advisors@garretsonfinancial.com, or simply call us at 908-276-9140.

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