



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!

44 South 21st Street, 2nd Floor Kenilworth, NJ 07033
 Phone 908-276-9140 Fax 908-276-9114 marie@garretsonfinancial.com

	Mother	Father	Student
1. Completed Garretson Financial Family Information Form	Available at www.GarretsonFinancial.com If you prefer, call 908-276-9140 and one will be emailed to you		
2. Student <i>and</i> Parent FSA ID. Please enter on Family Info Form. These numbers must be requested on line at www.fsaaid.ed.gov .	FSA ID for _Mother OR _Father (✓) <i>one</i> <i>Please enter on Family Info Form</i>		<i>Please enter on Family Info Form</i>
3. www.Collegeboard.com Student Username and Password for CSS Profile .			<i>Please enter on Family Info Form</i>
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. Social Security benefits received.			
10. Current contributions to IRA, TSA, 401K and Keogh plans. *			
11. Current value of parent's AND student savings (checking accounts, savings accounts, CDs, etc.).			
12. Current value of parent's AND student investments (stocks, bonds, mutual funds, 529 plans etc.).			
13. Value of other real estate owned, mortgage balance, year purchased, and original purchase price.	Purchase Price _____ Year of Purchase _____ Mortgage Bal _____ Home Eq Bal _____ <i>Please detail on additional sheet as necessary</i>		
14. The purchase price of your primary 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 _____		
15. Current value of parent and student retirement accounts. (CSS Profile Only)			
16. Value of parents' business (if over 100 employees) or farm; debt on business or farm. * (CSS Profile Only)			
17. Tuition paid, detailed by student, incl. elementary and secondary school tuition. (CSS Profile Only)	<i>Please detail on additional sheet as necessary</i>		
18. Family's medical and dental expenses not paid by insurance. (Include insurance premiums.) (CSS Profile Only)			

* Estimate these figures if necessary.