

Items Required For Your Financial Aid Meeting

**Note: Not everything will apply to your situation. If it doesn't apply, leave it blank and move on to the next item.
We just want to make sure that no stone is uncovered to help you maximize your aid eligibility.
If necessary, just estimate! When in doubt, bring it along!**

- Please complete "Information Family Chart" below. (SS#, Name, Grade Level, DOB, etc)
- Highlight the names of those attending college on the chart.

- Bring along your 2007 & 2008 personal **federal income tax returns**. (Remember to **include last year's W2 forms**)
- Bring your **current W-2s** for this year or **most recent pay stub**. (**most recent or most typical, year end**)
- **Bring your child(ren)'s last year's tax return** and **current pay stubs, W-2s**. (Child(ren) under financial aid consideration)
- Bring a copy of your **will** and your spouse's **will** (if married). (if none indicate here) _____
- Bring a copy of your **trust documents** you have set up. (if none indicate here) _____
- Bring all statements/Copies of **life insurance policies**. (include most recent cash value statements, if any)
- Bring all statements of **annuities** or contracts. (include most recent value statements)
- Bring all current **bank/investment** statements for **children & parents**. (Banks, Credit Unions, Funds, Investments)
- Bring all current **retirement statements**. (401(k), TSA, SEP-IRA, Roth-IRA etc.)
- Bring a list of **notes receivable**. (Money owed to you)

- Parent's **2008 contributions** to IRA, TSA, 401K, 403b and Keogh plans. * \$(_____) Amount here.
- **Interest and dividends** received by parents in 2008. * \$(_____) Amount here.
- **Interest and dividends** received by student in 2008. * \$(_____) Amount here.
- **Child support payments** made or received in 2008. * \$(_____) Amount here.
- **Social Security benefits** received for 2008. \$(_____) Amount here
- Current Total **Consumer/Credit Card Debt** \$(_____) Amount here.
- **Net business or rental income/loss** (income minus expenses) if applicable.. * \$(_____) Amount here.

- Do you have a **home equity loan or HELOC?** **YES** **NO** Amount Available: \$ _____

Amount in Use: \$ _____

- Property Assets: **Home Residence** Current Market Value \$ _____

Minus (Debt on Residence): \$(_____)

Positive Home Equity \$ _____

- Property Assets: **Other Real Estate** Current Market Value \$ _____

Minus (Debt on Residence): \$(_____)

Positive Other Equity \$ _____

- Business Ownership **YES** **NO** Value of Business Owned \$ _____

Minus (Debt on Business) \$(_____)

Business Equity \$ _____

- Farm Ownership **YES** **NO** Value of Business Owned \$ _____

Minus (Debt on Farm) \$(_____)

Farm Equity \$ _____

* Some information may not necessarily apply to your situation. The more information and the more exact the information we gather the better the advice we are able give. We will review these documents and return them promptly. Thank you for placing your confidence and trust in us.

Information Chart of Family Members

	Full Name	Social Security #	Birth Date	2008-09 Grade Level	2008 (Projected) Income	Total Savings
Parent						
Spouse						
Child 1						
Child 2						
Child 3						
Child 4						
Child 5						
Child 6						
Child 7						
Child 8						

Please note any special family situations (i.e. Divorce, Family Support, Child Support, Special Circumstances) on the lines below.
