



College Funding Systems
Grossman & Associates

For your individual evaluation, please have the following information available:

- For FAFSA security protocols, please be sure to have the student's email address, and both parents' email addresses.
- Student's current GPA and SAT/ACT scores.
- List of colleges your student is interested in attending.
- Student's and parents' most recent W-2s and/or 1099's.
- Student's and parents' **most recent** tax returns with all forms and schedules.
- Records of non-taxable income such as TANF, Social Security, and veterans' benefits.
- Total amount in your current IRAs, 401(k)'s, and other retirement plans.
- Student and parents' most recent statements for checking, savings, and investment accounts.
- Debt balances, payments and interest rates – such as: credit cards, cars, loans, etc.
- Current information on your home:
 - Original purchase price
 - Current market value (best estimation)
 - Balance owed on first and second mortgage
 - Monthly payment of first and second mortgage
 - Annual property taxes
 - Annual insurance premium
- Similar information on any other real estate you own (rental, second home, business, etc.)
- If self-employed, business or farm records (most recent).

For your meeting, we will be utilizing a virtual meeting application called GoToMeeting. Please go to [GoToMeeting.com](https://www.gotomeeting.com). In the top right corner, please select the join button. You will then select the “Join Meeting” option. Once our adviser has you on the phone, they will provide you the meeting ID. We can facilitate the audio for the meeting either through the phone or through computer audio.

If you have any questions, please contact our office.