

Checklist of Needed Documents

Client's Name: _____

Students Name: _____

Income Tax Returns Last Yrs

- Self
- Spouse

Most Recent W2/1099 or Earned Income

- Self
- Spouse

Retirement Accounts

- Roth
- SEP
- IRA
- IRA Rollover
- 401(k)

Stocks, Bonds or Other Investments

- Self n/a _____
- Spouse n/a _____

College Saving Account

- 529 Account
- Other _____

MYTUTIONSCORE REPORT

- Pulled By Client
- Pulled By Us

Mortgage Statements

- Primary Mortgage Statement
- Second Mortgage Statement
- Home – Equity Line of Credit Statement
- Original Purchase Price
- Current Market Value

Statements of Bank Accounts

- Self
- Spouse

Business Arrangements

- Buy/Sell
- Deferred Compensation
- Stock Option/Bonus Plan
- Farm Records

Records of Untaxed Income welfare, AFDC or veterans benefits, students, parents and/or grandparents

- Self n/a _____
- Spouse n/a _____

Checklist of Needed Documents for 2nd Appt

Client's Name: _____

Students Name: _____

Company Benefit Plan Booklets (Group Pension Plans)

- Your Employer n/a _____
- Spouse's Employer n/a _____

Insurance & Annuity Contracts

- Life Insurance
- Health Insurance
- Hospital & Major Medical
- Disability Insurance
- Automobile Insurance
- Property and Casualty/Homeowners

Copy of FAFSA

- If Previously completed
- Not Completed

Personal Employment Benefit Statements

- Self n/a _____
- Spouse n/a _____

Most Recent Social Security Statements

- Self n/a _____
- Spouse n/a _____

Most Recent Payroll Stub

- Self n/a _____
- Spouse n/a _____