



College Pre-Approval™ Checklist

Please prepare and/or gather up the following for your upcoming session. For financial items, please provide statement copies. Doing so will ensure the accuracy of your college funding assessment, as well as any subsequent advice.

Student Academics:

- Test scores (ACT / SAT)
- GPA
- Class rank & size
- List of up to 10 considered colleges

Financial Data (Parent & Student):

- Most recent tax return (Form 1040, specifically pages 1-2)
- Checking / Savings / Money Market Accounts
- 529 Plans
- Custodial accounts (UTMA / UGMA)
- Stocks / Bonds / Mutual Funds
- Retirement Plans & Contribution Amounts (401k / 403b / 457)
- IRAs (Traditional / Roth / SIMPLE / SEP)
- Pension & Deferred Comp Plans

Family Info:

- Age of older parent
- # of dependents in household
- # of college students in household
- Ages of all children in household

- Annuities & Permanent Life Insurance
- Values for Residence / Investment Real Estate / Farm / Business
- Liabilities (Mortgage / Home Equity / Credit Card / Education Loans)

Budget Considerations (Parent & Student):

- Monthly amount from income designated for college costs
- Assets designated for college costs
- Maximum amounts for education loan



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