



Proudly Helping Parents Plan for the Cost of Higher Education.

Free Consultation Checklist

In order for us to give you an accurate assessment of where your family stands in the federal and state financial aid formulas we will need you to provide ballpark figures in regards to the following information.

Student's current GPA, and ACT and or SAT score

Student's employment and earnings

Amount of money parent's are currently placing into retirement accounts (401k's IRA's, SEP, 403B's, Simple Plans etc.)

Most currently filed tax returns would be helpful (Student's and Parent's)

Records of untaxed incomes such as welfare, Social Security, ADFC, or ADC and any other veteran benefits.

Ballpark numbers on balances in savings accounts, checking accounts, brokerage accounts, IRA's etc.

Self employment records and or Farm records

List of Colleges student may be interested in attending

Current Mortgage Information

Original purchase price of home

Current market value

Balance owed

Monthly payment

Current year's taxes

Current year's insurance coverage

Info on property investments (rentals)

We at Cleveland College Funding understand the sensitive nature of the information requested and want to assure clients and potential clients that all data discussed will remain strictly confidential.