



Get Ready for Financial Aid Checklist

Parents: Ahead of filling out FAFSA and CSS/Profile Financial Aid forms, please complete the following steps.

- ☐ **Create a Google Drive folder to store financial documents**
 - ☐ Create a folder, and
 - ☐ Name it: Financial Aid | 2023-2024 | Student Initials
- ☐ **Gather Important Documents and upload them into Google Folder -- Parent**
 - ☐ Social Security numbers for student and both parents
 - ☐ Student Driver's License (if applicable)
 - ☐ Alien registration or permanent resident cards, if you or your parents are not U.S. citizens
 - ☐ 2021 W2s for Parents
 - ☐ 2021 W2s for the student (if applicable)
 - ☐ 2021 Tax Returns for Parents
 - ☐ 2021 Tax Returns for the student (if applicable)
 - ☐ 2021 Business Tax Returns (if applicable)
 - ☐ Current bank statements
 - ☐ An estimate of money expected to earn in 2022 for both parents
 - ☐ Parents' DOB and Date of Marriage (if applicable), and Date of Divorce (if applicable)
 - ☐ Financial information on savings, investments (e.g., 401Ks, stocks), and business assets for Parents and Student (e.g., 529 Plans)
 - ☐ Housing and Real Estate information: purchase date, purchase price, current value
 - ☐ Medical or Dental bills (if significant)
 - ☐ Any other financial information that tells the family's financial story
- ☐ **Obtain the College Board Username and PW**
 - ☐ Please note that the [CSS Profile](#) form is not free. The cost is \$16 to file, plus \$9 per application. For two schools, for example, the cost will be \$41 and payable directly via the CB website.
- ☐ **Get an FSA I.D -- Student AND Parent**
 - ☐ Go to <https://fsaid.ed.gov>
 - ☐ The student and one of the parents will need to sign up for a Federal Student Aid ID, also called an FSA ID, for us to work on the FAFSA form and sign it electronically.
 - ☐ The website will walk you through a quick and easy login process.