



What To Bring

- 1) Bring your spouse (if married)
- 2) Bring your paperwork:
 - Student's: Current GPA & ACT/SAT Scores
 - Most Recently filed Federal Income Tax records & W-2 Forms (Both Student & Parents)
 - List of Colleges that your Student is interested in attending
 - Current Mortgage Information
 - Current Retirement/Investment Balances
 - Current Savings & Checking Balances
- 3) Bring your student (if possible and they are old enough to participate in the conversation)

Due to limited schedule availability, if you need to cancel, please do so within 48 hours of your appointment. A fee of \$375 will be charged for no-shows.

BrightTree Financial believes the decision to attend college will shape a child's future. Such a life-changing event requires precision planning and dedication from the parent(s), student, and financial advisor.

This information is necessary to give you a snapshot of what you can expect from the colleges that your student is looking to attend based on real numbers. Without it, we would be guessing and gambling. This information will be used for no other reason.