



EVERETT WEALTH SOLUTIONS, INC.

Next Steps: College Financial Planning

Provide all pertinent data from the list below as it applies. All documents/information will be kept completely confidential. If emailing data, please use the ## email security protocol (ex: ## Data) Remove social security and account numbers. While we are very careful with your data once it arrives in our office, we cannot be responsible if your data is captured via email transmission.

Tax information:

- Most current Parent tax return (including W-2 forms)
- Most current Student tax return (including W-2 forms) Other records of income earned including trust tax returns
- Business tax returns

Legal information:

- Divorce agreement (if applicable)
- Will/Trusts Powers of Attorney

Insurance information:

- Social Security Statements and/or Pension Information
- Auto insurance coverage and premium information
- Homeowner's insurance coverage and premium information
- Umbrella policy
- Life Insurance policies –all family members (Cash and death values, premiums, beneficiaries)
- Disability policies
- Long Term Care policies

Employee benefits:

- Current Paycheck Stub
- Group Health Benefits
- Group Life Benefits/Beneficiaries
- Group Disability Benefits
- Pension Information

Everett Wealth Solutions, Inc. [EWS] is a registered investment advisor.
EWS provides fee-only fiduciary financial planning and asset management services.

- 401k, 403b, 457 TSP Statement

Mortgage and/or home equity information:

- Current mortgage statements showing balance due, interest rate, principal, interest, escrow payments and extra principal payments

Current savings and investments (Parent/Student):

- Checking and savings
- CD's
- Money market accounts
- Brokerage Accounts
- Stocks, Bonds, Mutual Funds
- Annuities

Individual or group retirement accounts:

- IRA, ROTH IRA
- 401k, TSP, 403b, etc.

Business owner information:

- Business asset value
- Number of employees
- Profit and Loss Statement for the last two years
- Current Balance Sheet

Current College Planning Student(s):

- Student(s) Name _____
- E-mail _____
- Phone _____
- Year of Graduation: _____
- FAFSA/Profile print outs
- College/University Possibilities

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