



FAFSA PREP LIST

Ready to fill out your FAFSA form?

The FAFSA questions ask for information about you (your name, date of birth, address, etc.) and about your financial situation. Here's a checklist of things you can do to prepare that will help make the process as smooth and simple as possible.

You will need the following:

- ☐ 1. Your FSA Account ID [Click Here to Create an FSA Account](#)
- ☐ 2. Your Social Security Number, or Alien Registration Number
- ☐ 3. Your Driver's License
- ☐ 4. Your 2019 Tax Records (Federal income tax returns, W-2s, and other records of money earned.) You may be able to transfer your federal tax return information into your FAFSA using the [IRS Data Retrieval Tool](#)
- ☐ 5. Records of Your Untaxed Income such as child support and veterans' noneducation benefits.
- ☐ 6. Records of Your Assets for example bank account statements, value of investments such as 529 accounts, stocks, bonds, and real estate excluding your primary residence.
- ☐ 7. Records of unusual financial family circumstances: high non-reimbursed medical expenses, unusually high dependent care costs, salary reduction, job loss, etc.
- ☐ 8. Title IV Institution codes for each school to which you are considering applying [FAFSA Federal School Code Search](#)

10 Laurel Avenue, Suite 100 - Wellesley Hills, MA 02481

Tel: (781) 239-1180 - Fax: (339) 686-3094 - AevitasWM.com

Your financial partner and mentor for generations™

A Registered Investment Advisor