HOW TO PREPARE FOR YOUR CSS PROFILE APPOINTMENT

Please log into College Board CSS Profile prior to your appointment and fill out all of the personal, contact, and demographic information.

1 Parent is Required to Attend
Student attendance is optional.

Basic Info
Have the student’s username and password for Collegeboard.org. Also have the student’s social security number on hand.

The Student’s List of Schools
Please have a list of schools that the student wants to apply to.

2019 Tax Returns for Student & Parent
Entire 2019 Federal Tax Return for both the parent(s) and student as well as your 2019 W-2’s. Have an estimate of 2020 taxes.

Please Know About Your Home
- Value of your home
- How much you paid
- How much you owe
- The year of purchase
- Monthly mortgage payment

Provide all the same information if you have any investment properties

Please Know these Amounts
- How much is in the parent & student checking and savings accounts
- Total value of your retirement account and investments (stocks, bonds, 529 Plan, mutual funds, and CD’s)
- How much was not covered by insurance in medical and dental expenses (how much paid to FSA)

If Applicable....
- If you own a business, please know the total value of the business (buildings & equipment) and how much you owe on the business, number of employees, and total gross receipts and expenses. Have business taxes available.
- Annual amounts of untaxed income received in the household (SSDI or child support)
- Tuition paid for student and siblings attending private elementary or high school