



Financial Aid Appointment Screening Questionnaire

If the person wanting the appointment answers any of these questions with a “yes”, please email or call Brad Williams with their:

- Name
- Email address
- Phone number
- Details of their situation

Brad will then do further screening to decide if he needs to see them or if they should be assigned another advisor to meet with them.

If all answers to the questions below are “no”, our College Options advisors will be able to handle the appointment.

- Do you own or co-own a business or a farm or a ranch with more than 100 employees?
- Do you own or co-own a farm or ranch that you do not live on?
- Do you have significant real estate or financial market investments?
- Do you consider your financial or personal situation extraordinary in any sense whatsoever (examples: divorce/separation within the last year, death in the family recently, bankruptcy, loss of job or business in the recent past, acquisition of an inheritance, significant assets in the name of the student, student living with a non-legal guardian, student having an abusive or estranged relationship with parents, etc.)?

Remember to give/send the person asking for an appointment a copy of pdf. File identifying the necessary documentation to bring to the appointment (College OPTIONS Financial Aid Appointment Documents Requirements – July 2018).

Please advise all students and parents that their FSA IDs should be secured at least 3 days before their appointment.