



CORE COLLEGE PLANNING





FINANCIAL SERVICES

You want your child to attend college.
But how are you going to pay for it?
What is the CSS Profile?
Where do you find the FAFSA form?
Why does the government say I can afford
more than I actually can?

When it comes to college financing . . .
you have questions.

We have the answers.

Advanced planning can make college more
affordable. Starting as early as middle school
and lasting through graduation, the decisions you
make can impact your ability to pay for college
and your opportunities for receiving financial aid.

Your college financial specialist is well-versed in
the world of college financial strategy. Using
expertise in higher education, personal finance,
and risk analysis, your financial specialist
creates customized plans to meet your family's
goals for affordability and funding.

I will lead you through the financial aid process
to gather pertinent data, securely upload
critical financial documents and keep you on
track to meet important deadlines.

EXPERTS

WHO SPECIALIZE IN COLLEGE PLANNING

- As your college financial planning advisor, I will help your family with strategies to afford college without jeopardizing retirement
- Preliminary financial aid award estimates for an unlimited number of schools.
- Exclusive resource library including:
 - College Journey Timelines
 - College Admissions Resume Development
 - Tips for Nailing the College Essay
 - How to write a brag sheet
 - Letters of Recommendation
 - College Essay Tips
 - Campus Visit Checklist
 - College Tracker
 - Developing a College List
 - Admission Interview Tips
- Consultation, preparation, and submission of the FAFSA and CSS Profile forms

Properly submitting all of the necessary forms and documentation is a critical step in securing financial aid. I will lead the way from the first form to the final award letter.

Upon receiving your financial aid awards, I can assess and compare them. If warranted, we can draft appeal letters to seek an increase in your award.
(additional cost)

CORE COLLEGE PROGRAM

- Personalized family contribution calculation, reduction analysis, and financial aid maximizer
- Preliminary financial aid award estimates for an unlimited number of schools
- Custom college funding solution—personal plan to cover the cost, but not overpay
- Full financial overview, including college funding, household cash flow, and retirement planning—with tailored strategies to improve each area
- Smart borrowing strategies to help align college funding with long-term financial goals, while maintaining healthy cash flow during college years and beyond
- Research school list in a Database of 5000+ institutional scholarships, award value, and criteria to qualify
- Exclusive resource library: 20 years of college know-how, guides, and tools
- Consultation, preparation, and submission of the FAFSA
- Consultation, preparation, and submission of the CSS Profile (if applicable)
- Verification and IDOC support
- Comparative analysis of financial aid awards