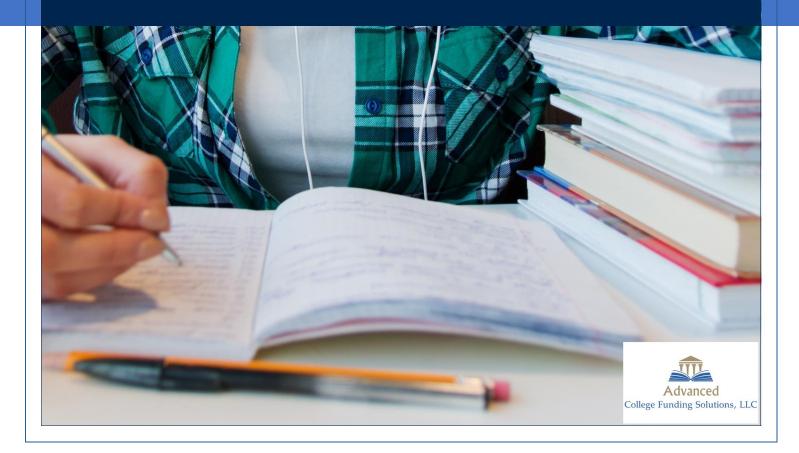
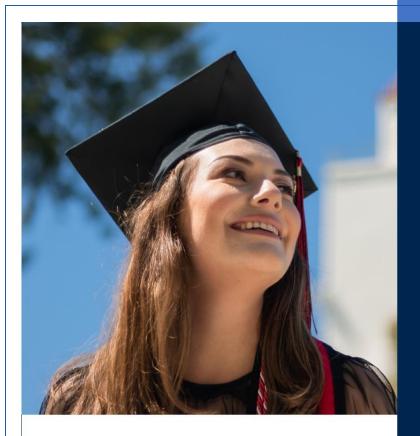


CORE COLLEGE PLANNING





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)



- 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