

COLLEGE AID PLANNING (CAP)

To make informed decisions when planning for college you need specialized knowledge in college admissions, financial aid, taxes, investing and financial planning. Even if you have professionals advising you in these areas, it is often difficult to pull that expertise together in a coordinated fashion to navigate the college financial planning labyrinth.

Our Consultations bring together all of our expertise in these areas to help you:

1. Keep it simple and effective;
2. Know that you are making the best use of your family's financial resources;
3. Reduce the cost of college through financial aid, tax savings & use of personal resources;
4. Determine your Best Strategy to pay for college and preserve assets and income for retirement and/or other financial priorities.

CAP Services

PRE-FAFSA/CSS EFC REPORT	\$275.00
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This initial assessment is designed to model your expected family contribution (EFC) based on your current financial situation. A report will model your upcoming FAFSA and/or CSS Profile EFC and funding sources.

IDENTIFY YOUR BEST STRATEGY	\$475.00
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The second component will include a one-hour college planning consultation and analysis to identify cost saving opportunities in the areas of (1) financial aid, (2) tax reduction, (3) loan and income strategies, and (4) use of personal assets. A summary report of your Best Strategy will be provided for your personal use.

IMPLEMENT YOUR BEST STRATEGY	\$2,750.00
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After identifying your Best Strategy, if you decide that you would like help implementing recommendations through the college funding process, we offer a more comprehensive service for an additional fee of \$2,750. You will have ongoing access to our college planning experts who will advise you on correct submission strategies of financial aid forms (FAFSA & CSS Profile), assistance with analyzing & selecting financial aid offers, and recommendations to pay for college in the most cost effective manner.