

# College Planning Package

Expert guidance for college planning and funding,  
tailored to your educational aspirations.

EMPOWERING FAMILIES FOR A BRIGHTER FUTURE



## Key Benefits:

- Financial Aid Forms and Appeals
- College Search and Test Prep Programs
- Private College Counseling Session
- College Funding Strategies
- Financial Readiness Review
- Private Scholarship Support

# Financial Aid Form Preparation and Submission

## ● College Planning Checklist:

Receive a comprehensive checklist with deadlines, updated electronically and emailed when tasks are completed or missing.

## ● FSA ID Creation Support:

Step-by-step guidance and assistance in creating your FSA ID, required for accessing and signing the FAFSA application online.

We ensure secure and unique FSA IDs for both students and parents.



## ● Form Completion:

Accurate and efficient assistance in completing all required financial aid forms, including the FAFSA, CSS Profile, Institutional Forms, and State Aid Forms.

## ● Deadline Management:

We track important financial aid deadlines, ensuring timely submission of all forms and documents to avoid missing aid opportunities.

## ● Updates and Amendments:

Assistance in updating and amending aid applications as necessary to reflect any changes in your financial situation or other relevant circumstances.

## College Guidance

## ● Private One-Hour Admissions Counseling Session:

Engage in a one-hour session with a dedicated college admissions counselor to establish timelines, set tasks, and create a tailored school list. Parents are encouraged to join to ensure everyone understands deadlines and tasks. (All counselors are members of the Independent Educational Consultants Association.)

## ● Written Summary Report:

Receive a detailed summary report, including a personalized checklist to keep the student on track.

## ● Specific Timelines:

Outline what needs to be accomplished each year from freshman year through senior year of high school.

## ● Maia Learning:

- Access a comprehensive platform that simplifies career and college discovery while reducing the stress of application requirements.
- Browse careers, research colleges, and manage your application to-do list seamlessly.
- Use the bookmark feature to create and narrow a list of best-fit schools.
- View college admission requirements, essay prompts, cost of attendance, majors, sports, demographics, deadlines, and other pertinent information for each school.

- Build a college resume from your profile information with just a few clicks. It is editable and customizable as per your preferences.

- Explore articles and study guides covering various topics including a student's view of campus, studying abroad, and specific career information.
- Task lists keep important dates and deadlines organized, including testing and application information.

## ● Magoosh ACT or SAT Test Prep

- Choose between our customized SAT or ACT test preparation programs. Each program offers comprehensive online resources, including over 1,750 SAT and 1,300 ACT practice questions with detailed video and/or text explanations.
- The SAT program includes 3 full-length practice tests and over 200 video lessons, while the ACT program features 4 full-length practice tests and over 250 video lessons. Both programs provide curated study schedules for thorough preparation.
- Students can access their chosen prep resources for 12 months, starting anytime, making it ideal for high school sophomores and juniors.



# College Funding Strategies

## ● College Planning Software:

- Access award-winning software to streamline merit and need-based complexities.
- Ensure smooth navigation of college selection by identifying colleges that are a financial fit.
- Calculate your Student Aid Index to inform financial aid strategies.
- Provide detailed estimates of college costs for informed decision-making.

## ● Financial Aid Optimization:

Explore innovative strategies to maximize college-assessed financial need.

## ● Student Loan Comparison and Review:

Thoroughly evaluate student loan options to facilitate informed decision-making.

## ● College Budget Creation:

Craft a personalized college budget tailored to individual circumstances.

## Financial Readiness Review (by a Certified Financial Planner and Fiduciary)

### ● Comprehensive Document Review:

Access to all your personal financial documents, including investment statements, mortgage documents, and previous year taxes, is required

### ● In-Depth Meeting:

Includes 90 minutes of virtual meeting time, featuring detailed discussions, strategy formulation, and problem-solving. Topics may include college financing, cash flow management, retirement planning, investment portfolio analysis, tax strategies, and financial risk mitigation.



### ● Transcribed Summary and Personalized Resources:

Receive a transcribed summary of the meeting notes along with resources tailored to your financial situation.

### ● Actionable Next Steps:

Conclude with clear, actionable steps designed to enhance your financial readiness.

# Financial Aid Appeals



- **Assessment of Financial Aid Award:**  
Thoroughly review your financial aid award letter to understand the details of the aid offered, including grants, scholarships, loans, and work-study opportunities..
- **Evaluation of Financial Circumstances:**  
Work closely with you to assess your financial situation, including any changes or extenuating circumstances that may not have been reflected in your initial financial aid application.
- **Crafting Compelling Appeals:**  
Provide the tools to help you craft strong appeal letters based on the reasons and special circumstances you share with us. This ensures your appeal presents a compelling case for additional financial assistance.
- **Submission and Follow-Up:**  
Guide you through the submission process, ensuring that all required documentation is included and submitted on time.

# Private Scholarship Support

- **Proprietary Scholarship Search Programs:**  
Access our exclusive programs to find scholarships specifically tailored to your unique needs.
- **Scholarship Program Review:**  
30 minutes of dedicated time to review our scholarship search tool, providing guidance on how to maximize its effectiveness.



## Pricing and Payment Plans

### First Student

**Pay-in-Full Price:**  
**\$3,495**

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**12-month Payment Plan:**  
**\$314.55 per month**  
\*includes an 8% financing charge

### Siblings

**Pay-in-Full Price:**  
**\$1,795**

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**12-month Payment Plan:**  
**\$161.55 per month**  
\*includes an 8% financing charge



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