

College Planning Service Agreement

		Parent	Parent	Advisor
1. EFC and FAFSA Optimization				
<input type="checkbox"/> Participate in detailed fact-finder	<input type="checkbox"/> Collect all pertinent information			
<input type="checkbox"/> Provide necessary documents	<input type="checkbox"/> Analyze with team			
<input type="checkbox"/> Allow EPR to file FAFSA	<input type="checkbox"/> Design A-B Solution Report			
<input type="checkbox"/> Be open to asset reallocation	<input type="checkbox"/> Deliver Report and recommendations			

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2. Maximize School Gifting Programs				
<input type="checkbox"/> Identify 6-10 preferred colleges	<input type="checkbox"/> Identify gift policies - preferred schools			
<input type="checkbox"/> Ignore 'sticker-price' in research	<input type="checkbox"/> Build/present College Timeline			
<input type="checkbox"/> Be open-minded about school options	<input type="checkbox"/> Build/present Net Cost Comparison(s)			
<input type="checkbox"/> Distinguish loans from grants	<input type="checkbox"/> Identify/analyze work-study options			

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3. Develop Price Competition Among Schools				
<input type="checkbox"/> Make application to at least 5 schools	<input type="checkbox"/> Help identify competing schools			
<input type="checkbox"/> Choose competing schools	<input type="checkbox"/> Provide links to applications			
<input type="checkbox"/> Share award letters	<input type="checkbox"/> Design cover letters/appeals			
<input type="checkbox"/> Follow custom negotiating strategy	<input type="checkbox"/> Customize a negotiating strategy			

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4. Identify Merit-Based Scholarships				
<input type="checkbox"/> Calculate CAP score	<input type="checkbox"/> Links to major scholarship portals			
<input type="checkbox"/> Identify top quartile schools	<input type="checkbox"/> Detail preferred school opportunities			
<input type="checkbox"/> Make applications for scholarships	<input type="checkbox"/> Explain/enroll SAGE Scholars program			
<input type="checkbox"/> Build a portfolio to 'market' student	<input type="checkbox"/> Ongoing guidance - application process			

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5. Finding Money to Pay the Balance				
<input type="checkbox"/> Be open to a 'budget' discussion	<input type="checkbox"/> Budget analysis – transfer payments			
<input type="checkbox"/> Identify recoverable transfer payments	<input type="checkbox"/> Refer third-party resources			
<input type="checkbox"/> Determine income commitment	<input type="checkbox"/> Analyze Student loan opportunities			
<input type="checkbox"/> Be open to recommendations	<input type="checkbox"/> Leverage government grants/programs			

	Develop/Execute	Meetings	Reviews
Estimated planning timeline			
Estimated Cost			