

Parent Parent SFC

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 SFC 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 |

Parent Parent SFC

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 |

Parent Parent SFC

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 |

Parent Parent SFC

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 |

Parent Parent SFC

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