

Engagement for a College Financial Roadmap

By signing this document and paying the required fee, you are engaging Strategies for College to build a College Financial Roadmap for your family.

Your Responsibilities - The report will be constructed using information you agree to provide. The accuracy of the report will be based on the accuracy of the information and assumptions you provide. You agree to provide the required personal financial and other information in the format prescribed by Strategies for College. Once the CFR report is complete, you will be contacted via phone, email, or text - by a Strategies for College representative, to set a meeting to review the report findings.

Strategies for College offers a money back guarantee (detailed below). Therefore, we require that the requested information be returned within 10 days of signing this agreement; and that the CFR review meeting take place within two weeks of our first outreach to set that meeting. If these timelines are not met by you – our report fee will be considered earned.

Our Responsibilities - Strategies for College will use the information provided to build a comprehensive College Financial Roadmap, which will include the following 'sub'-reports (and up to 2 revisions/updates on request):

Detailed EFC Report
Aid Eligibility Report (up to 5 colleges)
What-if EFC Report (EFC Optimization)
What-if Aid Eligibility Report (up to 5 colleges)
Family Raw Cost Timeline – Before Planning
Family Raw Cost Timeline – After Planning
Cost De-Compression Opportunity Chart
Transference – Before Planning
Transference – After Planning

Money-Back Guarantee - Provided the other terms of this engagement agreement are met, Strategies for College will issue a full refund of your College Financial Roadmap fee if we cannot demonstrate a reduction in Wealth Transfer of at least \$10,000. Wealth Transfer is the difference in the future value of your family's estimated cost of college cash-flow stream before planning – and after planning – using a client-supplied growth percentage projected to your age 70.

After the Report - Following delivery of the report, you are under no further obligation to Strategies for College. Our role is to identify the savings and show you how to capture them. While the report may make specific implementation recommendations, it is your responsibility to decide whether – and how – to capture the savings. You may do so through Strategies for College, or you may use your own resources for implementation.

Signed this _____ day of _____, 20_____

Client

Strategies for College