



Your **Tackling the Runaway Costs of College Solution** will include:

- ✓ **Identify Financial Goals** – Using the College Priorities Worksheet, identify and resolve your current objectives relative to college and life (retirement, home ownership, paying for college, starting a business, second home...)
- ✓ **Retirement Ready or Not** - This process will provide you with a projection of your retirement readiness. Without this knowledge parents routinely OVERSPEND on college and find out too late that they have delayed or destroyed their retirement dreams.
- ✓ **The Funding Process** – Details on the workings of the process, including what makes up the funding package; vital statistics on over 1,600 institutions regarding percentage of need met and type of funding offered; explanation of special circumstances and how they may apply to your family; and funding distribution procedures and their effect.
- ✓ **College Funding Analysis Report** – This report evaluates your family's current financial situation, offers available options and strategies, and projects the amount of institutional funding that may be offered based on each school's past awards.
- ✓ **Aid Eligibility Comparison Report** - This report will show your calculated EFC and the award history of multiple colleges in a head-to-head format, and forecast your out-of-pocket expense at each. This report could save you thousands of dollars in errant assumptions about the true cost of college. Additional reports can include a detailed EFC projection for both FAFSA and PROFILE, and a "What-will-college-cost Estimate" report.
- ✓ **What-If Analysis** - Changes in a family's financial structure may result in greater financial aid eligibility. This analysis will show the specific change and the financial aid eligibility impact. This report demonstrates the value of the recommendations, and can allow the parent(s) the opportunity to make an informed decision.
- ✓ **Merit Scholarship Report** - The student will be instructed on how to go about searching for private scholarships using the many available private and free websites; however in addition, we offer our own scholarship report which will identify available scholarships by state, school, major and a variety of other criteria identified by the student and their family. This report uses a database of more than 16,000 scholarships and will identify qualifications, contact information, website address, and range of awards.
- ✓ **LEAP Fit 2 Flourish, Birkman Method® Career Coaching & Consultation** - This evaluation is second to none in its ability to identify, clarify, and/or validate a student's intended career objective. In order to ensure the greatest probability of not changing major, it is essential to gain clarity on the desired career path prior to selecting a college or major; this test will allow us that opportunity.

- ✓ **College Quick Reference Reports** - Consistently formatted data on more than 13,000 U.S. colleges and universities in an easy to digest and evaluate 2-page report. These reports are key to efficient and accurate head to head comparisons. While this data is available elsewhere, no single source provides a more convenient display of: Cost, Freshman Academic Profile, Size, Campus Characteristics, Extra-Curricular Clubs and Activities, Majors, Affiliations, Financial Detail, Award History, Admissions & Contact Data, etc.
- ✓ **College Visit Scoring System** – A way to measure how well every school you consider matches up to your and your student’s expectations. With this system and criteria ranking that is derived from the students education objectives, you’ll have a method of evaluating school that goes beyond visual impressions and prevents relying too heavily on recollection.
- ✓ **FAFSA and CSS/Profile Review** – Council and review of the FAFSA and CSS/Profile application (not submission).
- ✓ **Student Aid Report (SAR) Review** – We review and check the SAR for accuracy and suggest any necessary corrections and/or updates.
- ✓ **Award Letter Evaluations** – We evaluate and offer an opinion regarding each institution’s offer of funding based on the student’s qualifications and the school’s past funding offers. We also suggest an appeal strategy for additional funding, if applicable.
- ✓ **College Funding Plan** – College funding recommendations and design including all sources of funds from income, assets, grants, scholarships and loans.
- ✓ **Communication Profile** - Online communication profile for parents (and students) to better understand each other’s strengths and how to communicate better together. The completed report includes individual strengths, a written description of general characteristics, and a list of do's and don'ts for communicating with each other.
- ✓ **Professional Counseling** – *Four meetings of 90 minutes each, during which the following may be discussed:
 - ✓ Financial goals, retirement projections and improvement
 - ✓ College funding recommendations and design
 - ✓ Student Aid Report Review and/or Award Letter Evaluations and Appeal Strategy
 - ✓ Parent Cash Flow improvement
 - ✓ **First year FAFSA & CSS Profile counseling (not submission)
 - ✓ Student Interview (Q/A, finance/expense insight, timeline, etc)

First Student **\$2,400**
 Each Additional Student **\$1,000**

**Additional meetings may be available as requested by client at \$250/hr.*

***Subsequent year FAFSA and CSS Profile preparation counseling available at \$250 per application*

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