



## Westface College Planning Engagement Agreement

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

- ✓ Identify Financial Goals
- ✓ Retirement Ready or Not
- ✓ Aid Eligibility Comparison Report
- ✓ What-If Analysis
- ✓ Merit Scholarship Report
- ✓ LEAP Fit 2 Flourish, Birkman Method® Career Coaching & Consultation
- ✓ College Quick Reference Reports
- ✓ The CVS System
- ✓ FAFSA and CSS/Profile Review and Filing each year until student graduates from college.
- ✓ Communication Profile
- ✓ Professional Counseling – \*Four meetings of 90 minutes each, during which the following may be discussed:
  - ✓ Financial goals, retirement projections and improvement
  - ✓ Parent Cash Flow improvement
  - ✓ College funding recommendations and design
  - ✓ FAFSA & CSS Profile counseling, review & filing
  - ✓ Student Aid Report Review and/or Award Letter Evaluations and Appeal Strategy
  - ✓ 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.*

À la carte pricing may be available upon request

Engagement Fee: \_\_\_\_\_

Parent(s) Name(s): \_\_\_\_\_ Parent(s) Email(s): \_\_\_\_\_

Parent(s) Phone(s): \_\_\_\_\_

Student(s) Name(s): \_\_\_\_\_ Student(s) Email(s): \_\_\_\_\_

Client Address: \_\_\_\_\_

Client Signature: \_\_\_\_\_ Engagement Date: \_\_\_\_\_

College Planning Services provided by Westface College Planning  
Financial Planning and Investment Advisory Services are available through separate agreement with Westface Financial Advisory

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*Westface College Planning, Westface Financial Advisory, and Westface Financial and Insurance Services are trade names of Paceline, LLC, a registered investment advisor*

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