



## Your Tackling the Runaway Costs of College Solution

### Professional Counseling

- ✓ Financial goals, retirement projections and improvement
    - ✓ College funding recommendations and design
      - ✓ Parent Cash Flow improvement
    - ✓ FAFSA & CSS Profile counseling, review and filing
      - ✓ Award Letter Evaluations and Appeal Strategy
  - ✓ Student Interview (Q/A, finance/expense insight, timeline, etc)
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- ✓ **Identify Financial Goals** –Identify your current objectives relative to planning for college and life (retirement, home ownership, paying for college, starting a business, second home...)
  - ✓ **Retirement Ready or Not** – Project your retirement readiness. Without this knowledge parents routinely OVERSPEND on college.
  - ✓ **College Funding Process** – Educate you on what makes up the funding package, college data regarding percentage of need met, types of funding offered, and explanation of special circumstances and how they may apply to your family.
  - ✓ **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.
  - ✓ **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, allowing you the opportunity to make an informed decision.
  - ✓ **Merit Scholarship Report** - The student will be instructed on how to search for private scholarships. We offer a scholarship report which identifies scholarships by state, school, major and other criteria.
  - ✓ **College Quick Reference Reports** - Data on more than 13,000 U.S. colleges and universities in an easy to evaluate 2-page report. These reports are key to efficient and accurate head to head comparisons.
  - ✓ **FAFSA and CSS/Profile Review and Filing** – Council, review and filing of the FAFSA and CSS/Profile applications **each year until student graduates from college.**
  - ✓ **Award Letter Review** –Evaluate each college’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 funding 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.
- ✓ **Financial and Loan Review each year until student graduates from college.**

## Westface College Planning Engagement Agreement

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

À la carte pricing and additional services 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 \_\_\_\_\_  
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Client Signature \_\_\_\_\_ Engagement Date \_\_\_\_\_

### Westface College Planning - Beatrice Schultz, CFP®

1498 SE Tech Center Place, Suite 385, Vancouver, WA 98683  
 360.818.7728

[bschultz@westfacecollegeplanning.com](mailto:bschultz@westfacecollegeplanning.com)    [www.westfacecollegeplanning.com](http://www.westfacecollegeplanning.com)

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*Financial Planning and Investment Advisory Services are available through a separate agreement with Westface Financial Advisory*

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