



## Educational Consulting Services Agreement

PARENT: \_\_\_\_\_ STUDENT: \_\_\_\_\_

With this agreement, Strategies For College, Incorporated (SFC) becomes an advisor to your family. We will provide information, counseling, proprietary tools and assessments to help you develop and implement a custom strategy with regards to college costs, admission and enrollment, based on the services you select. We do not “guarantee” admission to any college or university, nor can we “guarantee” funding from any source. We do not provide legal, tax or investment advice. Below are the “mutual responsibilities” to which we agree to adhere:

### **Your Responsibilities:**

- BE PREPARED for your meetings by completing “assignments,”
- MAINTAIN the confidentiality of copyright documents you receive from us (i.e., do not share copyright information with anyone),
- SUBMIT timely, accurate and complete information to us when requested,
- COMPLY with your school’s policies and procedures with regards to data submission,
- ADHERE to deadlines we specify. Except for illness and other events beyond your control, we expect you to complete things on time,
- DISCLOSE learning disabilities, counseling, medical, legal or other circumstances which may impact our ability to serve your family,
- PAY the fees associated with submission of admissions applications, financial aid applications and standardized testing.

### **Our Responsibilities**

- ALLEVIATE STRESS by guiding you through the process, each step of the way
- ASSIST you with defining, and prioritizing your objectives,
- PROVIDE timely interactions, current information and quality professional services,
- BE ACCESSIBLE to you throughout the duration of your agreement,
- RESPOND to your telephone calls and e-mails promptly,
- ENSURE the privacy of your confidential information (privacy policy attached)

**Interactions:** Interactions are scheduled according to when you begin the program. The interval between them is established at our discretion in order to allow you and us ample time to complete assigned tasks. Interactions typically require 60-75 minutes depending on the topic of discussion. We prefer to have our interactions take place during normal business hours, but we recognize that this is not always possible. We are available during evenings and weekends during peak times.

**E-mail:** E-mail support is provided throughout your scope of services. We usually respond to e-mail within 1-2 business days. Please make your emails brief, concise and on point.

**Payments:** All services are “prepaid” unless other arrangements are made. We do not invoice private individuals. All financial transactions are completed with this agreement using a major credit card or a personal check. Credit cards will be charged on the first business day of the month in which your payment is due. Checks will be electronically debited to your account on the first business day of the month in which your payment is due. Cleared checks will appear on your statement as electronic debits to your account from Strategies For College, Inc., PayPal or PaySimple Payment Network.

**Acceptable Forms of Payment:** Please indicate your choice of payment method below, and provide the information about your credit card or checking account below. Your signature below provides authorization for us to debit the account indicated on the dates specified.



Please indicate (x) your payment method: [ ] Personal Check [ ] MasterCard/VISA [ ] AMEX

Cardholder Name \_\_\_\_\_ Address \_\_\_\_\_

City, State, ZIP \_\_\_\_\_ Tel ( ) \_\_\_\_\_

FOR PAYMENT WITH MASTERCARD OR VISA – FOR AMEX PLEASE PLACE AN “X” IN THE FINAL BOX

Account # |\_|\_|\_|\_|\_|-|\_|\_|\_|\_|\_|-|\_|\_|\_|\_|\_|-|\_|\_|\_|\_|\_|

Exp. Date (MM - YY) |\_|\_|-|\_|\_| Three digit security code – Four digits for AMEX |\_|\_|\_|\_|

FOR PAYMENT WITH PERSONAL CHECK

Bank Routing Number \_\_\_\_\_ Checking Account Number \_\_\_\_\_

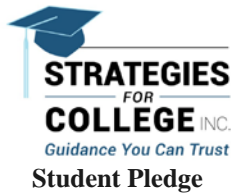
Services Requested	Cost	Our comprehensive agreement includes Modules 1-4. Retail cost of these Modules is \$6,480. If purchased together, cost is \$5,995.
__Module 1: Aid Eligibility	\$ 995	
__Module 2: Financial Document Prep	\$1,495	
__Module 3: College Search	\$2,495	
__Module 4: Essays/Admissions App	\$1,495	
__Module 5: Athletic Recruiting	\$ 595	
Total Cost of Services:	\$ _____	Payment Terms: _____

**Refunds & Cancellations:** This agreement may be canceled by either of us with **written notice** within three business days of the date signed below for a full refund. After three business days, if you or we decide to cancel this agreement, a file audit will be conducted. An appropriate pro-rata refund (or summary of the file audit if no refund is justified) will be issued within 30 days of the cancellation request.

Your signature below indicates your acceptance of this agreement. You agree to pay the Total Cost of Services according to the terms stated above. We agree to provide the services as described.

Client Authorization: \_\_\_\_\_ Date: \_\_\_\_\_

Strategies For College: \_\_\_\_\_ Date: \_\_\_\_\_



This is an important time for you, and I want you to know that I am committed to providing you with my very best effort. In return, I'm asking for no less than your best effort. Working together, I'm confident that we will see the best outcome for your college admissions campaign. In that regard, let's agree to the following:

- I will take this effort seriously by making time in my schedule to attend, participate and engage in college planning meetings and to complete college planning assignments given to me.
- I recognize that a successful outcome for me requires that I elevate the critical college planning milestones and meetings at least to the level of athletic, employment and recreational activities.
- Except for illness and other events beyond my control, I will make every effort to be on time and avoid rescheduling my meetings.
- I will not limit myself to fewer than six colleges for final consideration without discussing my reasons with my counselor and my parents. I will apply to at least 6 colleges that I am willing to attend even if one of them is an Early Decision application.
- I will work with my counselor to understand and apply the principles of sound decision-making taking into account a fair assessment of my competitive position.
- I will become familiar with and adhere to the deadlines and milestones essential to my admission and, if appropriate, my eligibility for college financial assistance and merit scholarships.
- I will work with my counselor to establish a clear college planning strategy which incorporates my personal traits, talents and strengths, preferences and abilities. I will share that strategy with my parents.
- I will work with my parents to establish the best possible schedule for visiting candidate colleges.
- During visits, I will interact with admissions representatives, students, faculty and coaches (where applicable),
- I will advise my counselor and my parents of any changes in my priorities, preferences or criteria that might impact my college list, scholarships or financial aid,
- I will ask for more help if I need it,
- I will check my email a minimum of three times weekly,
- I will respond to email from my Counselor within one day,
- I will login to my Strategies For College Naviance/Family Connection account at least once per week,
- I will do my best to have fun during this process!

I understand and agree to the above.

Student Signature \_\_\_\_\_ Date \_\_\_\_\_



## PRIVACY POLICY

We will always protect your right to privacy. By “you” or “your”, we mean your entire family and any information that is disclosed to us as part of this engagement.

We collect nonpublic personal information about you that is either provided to us by you or obtained by us with your authorization.

We do not disclose any nonpublic personal information obtained in the course of our engagement except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees and consultants who this information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

We retain physical and digital records relating to the professional services that have been provided and the fees you have paid. We also maintain physical, electronic, and procedural security safeguards to protect these records. Records relating to the services provided are destroyed upon your request or three years after the completion of our engagement.

### **Strategies For College, Inc. is a CFP Board-Registered CE Sponsor**

*Translation: We train Certified Financial Planners and Certified Public Accountants in college funding*



Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board’s initial and ongoing certification requirements.

### **Member, Financial Planning Association**





## **Module 1: College Aid Eligibility & Personal Affordability Review**

This module is designed to walk you through the maze of rules surrounding college aid eligibility and includes:

- thorough analysis of your current financial position (Expected Family Contribution or EFC) as calculated by the actual formulas used by private colleges and the federal government to determine eligibility for need-based grants, loans and Federal work-study
- assessment of “current eligibility status” vs. “strategic alternatives”
- “affordability review” - how to pay for college with current resources & minimum debt; demonstrate impact of various combinations of cash flow, borrowing, assets & debt
- demonstrate use of Net Price Calculators on college websites
- arrive at “final version” college funding strategy

Cost: \$995 – prepaid (additional fees may apply for divorced/separated parents)

Typical time to complete: 1 Month +/-

Module is completed when: Funding strategy has been established, recorded and delivered

## **Module 2: Financial Document Preparation, Process Management, Award Letter Review & Appeals**

This module includes professional oversight of the financial aid application and college funding process. We will:

- Help you generate aid estimates using federally mandated Net Price Calculators (NPC) on college websites
- Determine “aid eligibility” at each college irrespective of the NPC estimate
- Identify the application forms that must be filed at each college (FAFSA, CSS Profile, College Specific Application, Noncustodial Profile, Business Supplement),
- Work with you to collect and organize the required tax and financial data for your applications,
- Prepare and submit the aid applications
- Assist with compliance for Federal IRS data retrieval process,
- Evaluate the financial aid packages from each college,
- Compare your aid packages with the Net Price Calculator estimates,
- Assist with the appeals process if your financial aid package is substantially less than your aid eligibility,
- Provide assistance to noncustodial parents when required<sup>1</sup>

Cost: \$1,495<sup>2</sup>

Typical time to complete: Up to 7 months depending on start time

Module is finished when: Student has submitted deposit to college of choice

## **Module 3: Tailored College Search, Demonstrated Interest, & Interview Prep**

This module allows the student to get an objective evaluation of his/her chances of admission to selective and highly selective colleges using our Personal Assessment and College Admissions Profile (CAP). The CAP Index is a *proprietary* and strictly quantitative measurement of a student’s competitive position for admission at the 450+ colleges in our data base. It has proven to be highly accurate in assessing the academic credentials to be evaluated for admission. Includes:

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<sup>1</sup> For divorced/separated parents seeking financial aid and/or business owners seeking financial aid, the fee will be increased by \$350 due to the additional forms that are required to be submitted by the noncustodial parent.

<sup>2</sup> For divorced/separated parents seeking financial aid and/or business owners seeking financial aid, the fee may be increased due to the number of forms that need to be filed and the increased interaction time.



- review of 11th Grade PSAT (or diagnostic ACT or SAT)
- review of Myers-Briggs or Do What You Are assessment to determine appropriate test strategy,
- thorough evaluation of the high school transcript and extracurricular activities,
- calculation of “college gpa” based on core courses,
- exercise to clarify family priorities for college selection,
- discussion of the family priorities from exercise above,
- identification of 18-24 colleges at which the student has a reasonable chance for admission, that fit the family’s financial criteria, and are good “fits” for the student’s identified priorities,
- assist student with researching and refining candidate colleges to 8-12 preferred schools,
- visit and interview coaching,
- “demonstrated interest” counseling,
- discussion of the “5 Must Do” activities when visiting a campus,
- essentials of meeting with regional admissions officers, faculty and department heads,
- guidance on attending college fairs and “open houses,”
- College Evaluation Checklist which provides an opportunity to quantify observations about each college visited to make meaningful comparisons

*After at least four visits to college campuses,* we meet to discuss observations and further refine the college list and adjust college search criteria if necessary and assist with defining the final college list.

Cost: \$2,495 – prepaid

Typical time to complete: 3-8 months depending on start time

Module is finished when: Final list has been determined (typically by October of Senior Year in High School)

#### **Module 4: College Essays, Common Application and Stress Management**

**College Essays:** This module begins with a half-day seminar during the summer before the senior year conducted by staff who *specialize* in assisting students with college essays. While we cannot and do not write essays for students, we can help them brainstorm for suitable and appropriate topics, refine their approach to the topic, provide editorial input and make sure the real “voice” of the student is expressed. Students will have a chance to review and critique sample essays using criteria we supply. This is perhaps the most neglected area in the college admissions application especially with regard to the greater emphasis many highly selective colleges place on the applicant’s writing ability.

**Includes the basic essay for the Common Application plus up to eight (8) individual college supplemental essays.**

**The Common Application:** Also during the summer seminar, we walk students through the Common Application and any new changes in its format. We manage the application process from initial setup through online submission of the core application and any required supplements for each college including:

- Showing students how to coordinate faculty letters of recommendation, high school counselor evaluations, transcript release forms and official SAT/ACT score reports with the submission of the application so that each document (ideally) arrives at its intended destination on time
- Reviewing Common Application & Supplements prior to submission using in-house quality control procedures

Cost: \$1,495 - prepaid

Typical time to complete: 3 months depending on start time

Module is finished when: Common application and supplements have been reviewed by counselor and submitted by student.



## **Module 5: Athletics Recruiting**

By working directly with a university Athletic Director, this module assists students at any stage in the athletic recruitment process and includes:

- deciding whether or not to play a sport in college,
- comprehensive understanding of how the collegiate recruitment process works,
- discussion on how to most effectively communicate with college coaches & staff,
- advice and evaluation on whether student should play at the Division I, II, or III level,
- evaluation of athletic scholarship eligibility,
- prepare student for on campus visit with coaches,
- advice and analysis of skills and/or game film

Cost: \$595 prepaid

Typical time to complete: 1-3 months depending on start time.

Module is finished when: Student is actively being recruited, is determined to be a walk-on, or understands the necessary steps to begin the recruitment process.