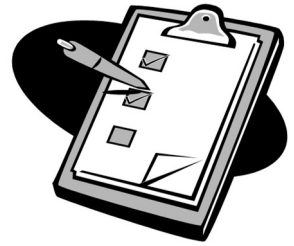


AZ College Consulting, LLC

New College Readiness Center - Be Intentional

www.AZCollegePlanning.com
Phone: (888) 237-2087 ext. 2
Fax: (888) 237-2087



College Planning Service Checklist

The following items comprise our Complete College Planning Service Package:

1. We will perform a Career Search (include education requirements, career description, as well as starting salary estimates). These will be based on the general interests of the student, and they will be given access to an on-line program (FOCUS2 ®) which maintains this information.
2. We will provide a “Best Fit” College Search. These will be based on the general interests of the student, and they will be given access to an on-line program (FOCUS2 ®) which maintains this information. We will also give additional recommendations, as needed.
3. We will perform multiple personalized, private student interviews to discuss their career/major choices, college selections, as well as admission and career tips we’ve gleaned over the years. We’ll do what their Guidance Counselor should be doing but isn’t.
4. We will allow your student access to our “Boot Camp Classes”, which will entail discussing admissions requirements, admissions essays, selecting the right colleges, how to properly market and promote yourself to colleges, and what the student should be doing now. (see website for list of classes)
5. We will review up to 3 essays per student and provide a written critique for each.
6. We will provide you with a College Planning Checklist containing essential deadlines, up-coming events, and timelines as to what we will be doing for you and your student and when.

BONUS: Access to the new “Be Intentional” program which includes videos, timely text message REMIND and more.

7. We will calculate your Estimated Family Contribution (EFC) and or Student Aid Index (SAI).
8. We will provide recommendations and a plan to reduce your EFC by thousands of dollars per year, if applicable.
9. We will provide financial aid award estimates for each school under consideration including the amount of free money and loans you should receive, as well as recommending additional schools to be considered that are a good match for your student AND generous with their grant monies.
10. We will analyze your financial situation using our “college cash flow maximizer” software and provide appropriate recommendations for the best way to pay for your share of college costs without you having to eat beans and rice for the next several years or mortgaging your house to the hilt or completely destroying your retirement accounts. (By the way, just the peace of mind of knowing where this money will come from for ALL of your children is worth our fee alone!)
11. We will provide a detailed financial overview, analyzing all areas as they relate to college as well as your budget, taxes, retirement and other areas of financial management.

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12. We will provide a management report detailing ways to improve your tax situations, retirement and other areas of financial management.
13. We will provide our proprietary ‘tax scholarship’ information, when applicable (usually if you make too much money to qualify for any Need-Based aid), which is guaranteed to save you thousands of dollars a year...again.
14. We will complete the Free Application for Federal Student Aid (FAFSA) on your behalf accurately and on time, so you won’t have to deal with this at all.
15. We will register your student for the CSS Profile and complete it accurately and on time, if you apply to schools that require it.
16. We will complete any other Institutional financial aid forms that are required by the individual schools and are provided to us by the client or instruct you how to file it properly.
17. We will confirm the accuracy of the Student Aid Report (SAR) and make any adjustments.
18. We will sponsor Teleconferences, Webinars and live classes of “what you need to be aware of or what you should be doing now” to keep everyone on-track.
19. We will sponsor a client-only event in March/April of your child’s senior year to discuss negotiation strategies, how to read your award letters, what to do if they don’t offer you enough aid, as well as additional tax and budgeting tips to revolve around paying for college.
20. We will provide you with a copy of our tested negotiation letter, as well as the exact steps to follow when negotiating with the colleges (we can’t negotiate directly with the schools, but we will hold your hand through the whole process).
21. We will provide updates of changes in legislature relating to college tax laws or anything that might affect your financial situation through our newsletter, email and or website.
22. We will provide your student with unlimited telephone support (your student can call us as much as they wish with as many questions as they wish).
23. We will provide you, the parents, with unlimited telephone support (with our Complete Package, you are *not* billed by the hour for your calls or meetings, which saves you from paying J.D.’s hourly rate of \$250 or Jennifer’s rate of \$150 an hour. Therefore, you *never* have to worry about watching the clock. Our only concern is getting your questions answered and getting you and your student taken care of!)
24. Bonus: We will give you access to the exclusive [updated AZ College Planning website](#) chock full of special reports, PDFs and online videos including: Guide to Surviving Student Dorm Life, Guide to the Student College Admission, Secret List of Tips That Make Applying to College Easier, Essay Tips & Tricks, and much much more!

“College Planning Services Checklist” (Rev 4/2022)

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