

College Planning Success Road Map



Discovery

- Your goals and long-term plans
- Your academic and financial capital requirements
- Opportunities with your Expected Family Contribution (EFC)
- Initial money decisions



Research and Planning

- Research “best fit” colleges and universities
- Net costs and best options
- Identifying the real data you need to know
- Developing the ideal college list



Retirement Considerations

- Determining funding sources to pay for college
- Paying for college without impacting your retirement
- Determining asset shifts to qualify for more aid
- Loan options for college



Making it Happen

- Applications strategy
- Completing all forms and requirements on time
- Accessing financial aid if needed
- Filing financial appeals with colleges