



College Funding Strategies · Financial Aid
College Admissions Counseling

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Senior Year

Check off each box as you complete each suggestion:

July thru October

- If new** “financial” client, make appointments with **College Insights** to “catch up” with research, development, and finalization/implementation of college funding strategies/plans. (See **Freshman Year** through **Junior Year January thru June** for details).
- If new** “financial” client, make appointments with **College Insights** to “catch up” with college selection process – “**Preliminary List**” and “**Final List**” with **Committee** feedback and support. (See **Junior Year January thru June** for details).
- If existing** “financial” client and not completed, make appointments with **College Insights** to finalize/ implement college funding strategies/plans. (See **Freshman Year** through **Junior Year January thru June** for details).
- If existing** “financial” client and not completed, make appointments with **College Insights** to “catch up” with college selection process – “**Preliminary List**” and “**Final List**” with **Committee** feedback and support. (See **Junior Year January thru June** for details).
- Keep student on track with academic tasks (see **Academic College Calendar** for details).
- Research private scholarships – “focus on local”.
- Based on **Committee “Final List”** feedback, research (and ideally visit) alternative colleges provided, communicate with the **Committee**, and work towards a “**Final Final List**” of colleges (“minimum six to eight”, plus more if applicable). (**Please note:** At this point, most of the top choices have been finalized and together we are “tweaking” the list financially for “negotiation” purposes, etc.)
- Determine whether any colleges will be applied to as “**early decision**” and/or “**early action**”; discuss financial tradeoffs with **College Insights**.
- Complete and send the College Insights “**Final Final List**” of colleges to the **College Insights Committee**. (**Please note: ANY changes to this list once received MUST be communicated to College Insights! College Insights** assumes the student **WILL APPLY to all schools** on this list.
- Decide whether you want College Insights to “Process Financial Aid Form” for you.
- Determine the financial aid process, forms required, and financial aid form deadlines for each school. (**Please note:** these forms include the FAFSA, CSS PRO-FILE, school specific forms, “verification” forms, required supplements, etc.)

Financial College Calendar

College Insights, Inc.