



College Funding Strategies · Financial Aid
College Admissions Counseling

5 Independence Way, Suite 300
Princeton, NJ 08540
Tel: 732-333-0308 · Fax: 732-333-0319
www.college-insights.com

By the end of your second college financial meeting with us, we will show you the “right schools” for your pocketbook!*

- **Your personalized, customized “Other people’s money” vs. “Your money” opportunities and options**
- **Best types of schools with “free money” matched to your unique college goals**
- **Your detailed roadmap how to proceed and obtain the “free money” we find for you**

How do we get there?

First Meeting (with you)

- **“Get to know you” college financial meeting**

Behind the Scenes (by us)

- **Analysis and identification of customized opportunities for “Other People’s Money” vs. “Your Money”**

Second Meeting (with you)

- **Educate you about your unique “Other People’s Money” opportunities and your roadmap (next steps) of how to get it**

****By focusing on “Other People’s Money” first!***

Two Meetings



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First Meeting (with you)

“Get to know you” college financial meeting

- Review of college goals, costs and budgets
- Personal financial “fact find”:
 - Actual income and assets (parents and students)
 - Projected income and assets (parents and students)
 - Overall financial/retirement goals and plans
- Make copies of important financial documents for our analysis
 - Tax returns and W-2’s
 - Bank and investment statements, etc.

Behind the Scenes (by us)

Analysis and identification of customized opportunities for “Other People’s Money” vs. “Your Money”

- Calculate Student Aid Index (SAI) – current and projected
 - Determine eligibility for need-based aid
 - Develop customized strategies to become eligible for need-based aid and/or increase eligibility (reduce SAI)
- Identify best “free money” colleges matched to your unique college and financial goals
 - Use of proprietary college data to identify “schools with money”
 - Need-based vs. non-need-based
 - Types of schools by “financial aid policy” matched to your personal situation (the “matrix”)
 - Learn “true cost” of colleges vs. “sticker price”

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Second Meeting (with you)

Educate you about your unique “Other People’s Money” opportunities and your roadmap of how to get it

- Share the results of our analysis
 - Your personal SAI – before and after strategies
 - Best “free money” types of schools for you (the “matrix”)
 - Examples of best schools for your pocketbook
 - Learn opportunities, options and tradeoffs (e.g., need-based vs. non-need-based, public vs. private, etc.)
- Show you your roadmap (next steps) of how to get you the “free money” we discussed
 - Further discussion of SAI reduction strategies, if applicable
 - Finalize college budgets and strategic direction
 - Provide “right schools” (via Committee) for your review, leading to “Final List”
 - Get through the “financial aid process” (FAFSA, PROFILE, etc.)
 - Negotiate with colleges for more “free money”
 - Determine how to best use “Your Money”
 - Learn how to best pay the college bill

Two Meetings