

Comprehensive: Financial Assessment, Application & Award

Comprehensive Services support Juniors & Seniors from start to finish in the financial aid process, ensuring success in all 6 critical areas of the financial aid process.

What you will achieve...

- 1 Understand your estimated financial aid packages for each college on your list.
- 2 Calculate what colleges expect you to pay and how they get to this number.
- 3 Evaluate ways to increase the aid packages you can expect and explore your best financing options.
- 4 Ensure that your financial aid applications are complete, accurate and submitted by the deadlines.
- 5 Interpret and compare award letters, including strategies to negotiate increased financial aid packages.
- 6 Analyze loan and other payment options so you make the best choice in financing.

Taking every action you need for financial aid success

Includes:

- 6 deep-dive meetings
- 2 additional on-demand meetings
- 5 custom financial reports
- 4-year financial aid & cost projections
- 20 colleges for analysis
- 10 college financial aid applications
- 10 college award letter reviews



Outline of Services Milestones

Milestone	Service
MEETING 1	We have an initial deep-dive meeting centered around your college choices and financial goals in paying for college.
MEETING 2	I gather and catalog all pertinent financial information to calculate your Expected Family Contribution (EFC), both FAFSA & CSS Profile.
REPORT: EFC Analysis	I conduct an analysis of your EFC calculations, explaining how your income and assets are impacting your financial aid. This analysis is critical to improving your financial aid standing – and award packages.
MEETING 3	We meet to discuss these impacts and review potential financial strategies to increase your aid packages.
REPORT: College Aid Comparisons	I research your estimated financial aid awards for up to 20 colleges and present the results in a detailed, side-by-side comparison. You will have a comprehensive view of costs to better inform your application strategy.
MEETING 4	We review these aid packages and discuss affordability scenarios given your financial situation for the entire 4+ years of investment. It's important to understand the total financial impact of your college selection, beyond the first year.
REPORT: Applications	I complete all financial aid forms for up to 10 colleges, including FAFSA, CSS Profile and any college-specific forms, ensuring accuracy and eliminating mistakes that may cost you award money.

Outline of Services Milestones

Milestone	Service
REPORT: Award Letter Comparisons	I standardize and analyze your award letters to provide detailed, side-by-side look along with comparative insights of your offers.
MEETING 5	We discuss the the pros & cons of each college's award package given your financial situation and strategize on negotiations or appeals. The first financial aid awards are not final. I create opportunities for you to increase these offers and reduce your costs.
REPORT: Loan & Financing Options	For your final college choices, I provide financial analysis of your payments over the next 4+ years, with a comparison of loans and other financing options to minimize impact to your debt and savings.
MEETING 6	We discuss all financing options to decide on the best ones that match to your financial goals beyond college funding. We will also go thorough review of tax strategies to offset your costs.

Hourly and service-specific options are also available.
Please contact Paul Martin at paul@collegemoneymethod.com