

Early Financial Aid Assessment & Action

Early Financial Aid Assessment empowers you with the advanced knowledge of how colleges will assess your financial situation and early strategies to increase your opportunities for financial aid well before applying to college.

This engagement will give you actions to take in your Freshman, Sophomore, and Junior years to positively impact on your financial aid application and future awards.

What you will achieve...

- 1 Understand how the financial aid system works for your family's financial situation.
- 2 Calculate what colleges will expect you to pay and how they get to this number.
- 3 Evaluate early options to improve your financial aid standing well before applying.
- 4 Develop a high school financial action plan to increase award opportunities and afford college.

Taking every action you need for financial aid success

Includes:

- 3 deep-dive meetings centered around your financial goals
- 3 custom financial reports
- Personalized action calendar to increase your financial aid



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Outline of Services Milestones

Milestone

Service

MEETING 1

Our initial meeting is centered around your future college choices and financial goals in paying for college. We review the rules of the financial aid process and the methodologies that colleges use to calculate your ability to pay.

REPORT: EFC Analysis

You receive a personalized report on your Expected Family Contribution (EFC) using both the federal (FAFSA) and institutional (CSS Profile) applications. This will provide you with a detailed analysis of how your income and assets impact what you are expected to pay.

MEETING 2

We meet to discuss these impacts and review potential financial strategies to increase your financial aid package.

REPORT: Strategies

You receive a recommendations report on financial strategies that can positively impact your financial aid opportunities, outlining pros & cons of each strategy.

MEETING 3

We meet to review recommended strategies and the timeline for implementation. The timing of your financial actions has significant impact on your future aid eligibility and awards.

REPORT: Action Plan

You receive a personalized calendar based on your financial situation of actions you can take each year of high school to improve your financial aid opportunities.

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