

Evaluation & Planning Services

Evaluation & Planning Services are customized to support junior & senior families to succeed in 3 critical areas of the college evaluation and planning for the financial aid process.

1. Establish goals for your college financial plan

Get the background you need on how financial aid will work for you. Bring clarity and precision to how you can pay for college.

2. Understand your financial aid eligibility and increase award opportunities

Get inside knowledge on how financial aid rules determine how much you pay and your aid eligibility. Learn how to increase the money you receive from colleges.

3. Compare college financial aid awards and cost

Know how much the colleges you're considering will offer in financial aid before applying. Create more options and explore colleges that offer more generous awards.

Services include:


- 5 individual meetings
- 4 personalized financial reports
- 4-year financial aid & cost projections
- 20 colleges for financial aid evaluation



Evaluation & Planning Services

Details of Services Engagement


Outcome #1 **Establish goals for your college financial plan**

 **Goals**

What we'll accomplish together...


- ✓ Establish an overview of the financial aid process
- ✓ Review your financial resources available to pay for college
- ✓ Discuss expectations on how much to pay for college

How we'll accomplish these goals...

 **Meeting #1**


We have an initial deep-dive meeting centered around your college choices and financial goals to pay for college. We review the entire financial aid process, answering your questions about what you can expect for the cost of college and your options to pursue financial aid.

Resources you'll receive to make decisions...

 **Resources**

- Initial budget with your financial resources and options to pay for college


Outcome #2 **Understand your financial aid eligibility and increase award opportunities**

 **Goals**


What we'll accomplish together...

- ✓ Detail the rules and formulas on how colleges determine your financial aid eligibility
- ✓ Calculate your Expected Family Contribution (EFC) for both FAFSA & CSS Profile applications
- ✓ Review recommendations on possible ways to increase your need-based aid eligibility
- ✓ Figure out your best financial aid match to maximize your award potential

How we'll accomplish these goals...


 **Meeting #2**

I analyze your Expected Family Contribution, explaining how your income and assets impact your financial aid eligibility. These analyses and recommendations are the foundation to increasing your award opportunities.

 **Meeting #3**

We meet to discuss different college financial aid policies, focusing on those colleges that would offer you the most generous financial aid packages.

Resources you'll receive to make decisions...

 **Resources**

- Detailed report and analyses on how your income and assets impact your financial aid eligibility.
- Recommends on actions and next steps to increase your opportunities for financial aid.

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Details of Services Engagement

Outcome #3 Compare college financial aid and costs

Goals

What we'll accomplish together...

- ✓ Calculate estimated financial aid awards for the colleges on your student's list
- ✓ Understand colleges generosity with free money versus reliance on loans
- ✓ Evaluate your college prices early and compare these prices with your current budget
- ✓ Create options to consider additional, more generous colleges

How we'll accomplish these goals...

Meeting #4

We review your estimated financial aid packages and discuss affordability scenarios given your financial plan for the 4+ years of investment.

Meeting #5

We meet to discuss next steps and an action plan for you to continue the financial planning and financial aid application process.

Resources

Resources you'll receive to make decisions...

- College aid comparison report: estimated financial aid awards for up to 20 colleges in a detailed, side-by-side comparison.
- Financial planning calculator: calculator that allows you to see how much you may need to borrow given each college's financial aid package and your current resources to pay for college

Ready to start creating a plan to pay for college and get the most financial aid?

Let's talk...

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About Paul Martin

Paul is founder of College Money Method, a financial advisory focused on helping students and families with college affordability and the financial aid process. A graduate of Harvard and MIT, his passion for this work stems from his own experience going through the process as a first-generation college student.

In addition to advising families, he partners with 18 independent schools and Miami-Dade and Broward School Districts to offer a curriculum on financial aid and paying for college to students of diverse economic backgrounds.