



## Collegiate Funding Solutions

*“ THE Web-based College Planning Solution for the Financial Services Professional ”*

[www.collegiatefundingsolutions.com](http://www.collegiatefundingsolutions.com)

	Without CFS	With CFS
<b>Cost of college</b>	<b>Increased</b>	<b>Decreased</b>
<b>Retirement Funds</b>	<b>Decreased</b>	<b>Increased</b>
<b>Funds for college and retirement?</b>	<b>NO</b>	<b>Yes</b>



**NOW – parents are interested!**

**COLLEGIATE  
FUNDING  
SOLUTIONS**

Because every dollar we can save them on college due to a college financial planning strategy is a dollar that can be reallocated for other **EMOTIONAL & URGENT** purposes:

- Retirement**
- Security**
- Nest Egg**
- Wealth Accumulation**



CFS can help you convert all your clients with college-bound children or grandchildren into college planning clients through:

***practical, specific and cost effective strategies for creating demand for your service***

- 1. Completely web-based – two options**
  - a. Standard – Access into CFS site/software
  - b. Advisor branded website
- 2. Proprietary Online Questionnaire – “smart form”**
- 3. Expert System software**
  - a. Immediate Results
  - b. Little or no labor required
  - c. Dynamic Updating – Always current. Feedback from licensees integrated into capability. Expanding Knowledgebase. Every licensee benefits!
- 4. Simplicity – Easy to understand/Easy to use**



**1. Advisor or client** can access CFS site or an advisor branded website.

**Advisor or client** completes online questionnaire and submits form



**2. Plan** is immediately generated by the CFS expert system



**3. Link** to the detailed plans is sent the advisor

**5. Advisor** schedules meeting with client to review plan and discuss appropriate course of action



**4. Advisor** downloads results and develops action plan for client





With CFS you have a solution at hand

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	Before CFS	With CFS
<b>Complex</b>	<b>Yes</b>	<b>No</b>
<b>Expensive</b>	<b>Yes</b>	<b>No</b>
<b>Labor Intensive</b>	<b>Yes</b>	<b>No</b>
<b>ROI</b>	<b>?</b>	<b>High</b>

## Benefits

1. **Offer a unique and desperately needed service** to existing and new clients. Linking and solving their two **emotional concerns** – college and retirement.
2. **Become a “virtual expert”** with little cost/effort on your part - How much is your time worth? Access years of college planning experience and the collective expertise of many of the top college financial planning experts in the country through the CFS expert system.
3. **Increase referrals** – Word of mouth and client referral program
4. **Differentiate yourself** from your competition
5. **Position yourself** for back-end/other opportunities with client.
6. **Leverage technology** – To increase productivity. Yielding dramatic cost savings for you and your clients
7. **Increase profitability** – increase revenue, reduce costs.
8. **Peace of mind** – from providing “best possible” service to client



## Next Steps

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1. **Select** the licensing option that best fits your goals.
2. **Complete and fax** license to CFS at 530 430-3001.
3. Within days, you can begin to **integrate** your enhanced service into your business.