



### High Praise for CFS

Since 2006, Wachovia Education Finance has enjoyed a strong partnership with Roger Lorelle and the entire team at Collegiate Funding Solutions. I've been especially pleased with the positive feedback received from Wachovia employees and customers regarding both CFS and its unique value-added services.

From experience, we know that many families struggle to find ways to pay for college without jeopardizing their own retirement plans. We are pleased to offer CFS' detailed strategies as a powerful, customized tool to assist families with balancing these often-competing financial goals, while helping more students achieve the dream of an affordable education.

Allen Westbrook  
VP for Affinity Partnerships  
Wachovia Education Finance

CFS takes college planning way beyond the standard 529 Plans that we have all been using. The first plan I ran for a client will actually save that client over \$10,000 in taxes! It is great to be able to show clients how to SAVE money and avoid taxes, instead just promising to make them money. It brings another dimension to the relationship.

D. Schneider, CFP  
New York, NY

I've been extremely pleased with my partnership with Collegiate Funding Solutions. They offer marketing and subject matter expertise, service and importantly, follow-through for the college planning component for my firm. They are truly a collaborative partner in expanding my service offerings.

Kyle Meyer, CFP  
Meyer Financial Planning  
[www.meyerfinancialplanning.com](http://www.meyerfinancialplanning.com)

Collegiate Funding Solutions helps my clients eliminate the uncertainty, worry and anxiety of how they are going to pay for their children's education; replacing this with practical strategies for preparing for and funding future education costs in the most effective manner."

Jeffrey N. Bogue, CFP™  
Bogue Asset Management, LLC  
Wells ME  
[www.bogueassetmanagement.com](http://www.bogueassetmanagement.com)

I see CFS as a way for me to:

1. Improve my expertise, understanding, and most importantly client solutions for funding education

2. Improve my productivity by making it faster and easier to provide outstanding and specific recommendations
3. Improve my earnings by having more satisfied clients.

Kent T. Hickey, MBA, CFP®, NAFPA-Registered Financial Advisor®  
Journey Financial Advisors, Inc.  
Allentown, PA  
[www.journeyplanning.com](http://www.journeyplanning.com)

I have found Collegiate Funding Solutions to be proactive, professional and responsive in everything they do. That includes routine and ongoing training and informational webinars to explain the evolution of their service. Their use of modern technology such as webinar and web conferencing provides a very effective use of time for me and allows them to reach many points with the same information at one time. Good for them and good for me.

Jeff Whittaker CPA, CFP  
Whittaker and Associates LLC  
Flower Mound, TX  
[www.flowermoundfinancialplanner.com](http://www.flowermoundfinancialplanner.com)

I chose Collegiate Funding Solutions as a service provider because their education-funding product offered the features I was looking for in a cost-efficient package. CFS's software is web-based, so my clients or I can access it easily from anywhere. The recommendations and reports generated are comprehensive and yet straight-to-the-point. And the up-front investment involved doesn't make you think twice.

Paul Winter  
Five Seasons Financial Planning  
Holladay, UT  
[www.fiveseasonsfp.com](http://www.fiveseasonsfp.com)